

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

Due: July 3, 2025

Institution:

Institution UNITID:

Individual responsible for plan

Name(s) & Title(s):

Email address(es):

Telephone number(s):

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

University of Mary Washington

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	\$9,346	\$9,626	3.0%	\$9,915	3.0%
In-State UG Mandatory E&G Fees	\$60	\$60	0.0%	\$60	0.0%
In-State UG Mandatory non-E&G Fees	\$5,958	\$6,196	4.0%	\$6,444	4.0%
In-State UG Total	\$15,364	\$15,882	3.4%	\$16,419	3.4%
Out-of-State UG Tuition	\$22,852	\$23,538	3.0%	\$24,244	3.0%
Out-of-State UG Mandatory E&G Fees	\$60	\$60	0.0%	\$60	0.0%
Out-of-State UG Mandatory non-E&G Fees	\$5,958	\$6,196	4.0%	\$6,444	4.0%
Out-of-State UG Total	\$28,870	\$29,794	3.2%	\$30,748	3.2%

Part 2: Revenue: 2024-25 through 2031-32
University of Mary Washington

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)	Chg	2026-2027 (Planned)	Chg	2027-2028 (Planned)	Chg	2028-2029 (Pro Forma)	Chg	2029-2030 (Pro Forma)	Chg	2030-2031 (Pro Forma)	Chg	2031-2032 (Pro Forma)	Chg	2024-2032 Chg	CAGR
	Total Collected Tuition Revenue	Total Collected Tuition Revenue		Total Projected Tuition Revenue		Total Projected Tuition Revenue		Total Calculated Tuition Revenue		Total Calculated Tuition Revenue		Total Calculated Tuition Revenue		Total Calculated Tuition Revenue			
E&G Programs																	
Undergraduate, In-State	\$24,771,148	\$25,468,005	2.8%	\$26,122,596	2.6%	\$26,906,274	3.0%	\$27,074,829	0.6%	\$27,243,384	0.6%	\$27,411,939	0.6%	\$27,580,494	0.6%	11%	1.5%
Undergraduate, Out-of-State	\$8,162,186	\$8,321,521	2.0%	\$8,572,995	3.0%	\$8,830,185	3.0%	\$8,999,893	1.9%	\$9,218,089	2.4%	\$9,509,017	3.2%	\$9,799,945	3.1%	20%	2.6%
Graduate, In-State	\$1,025,152	\$1,040,086	1.5%	\$1,058,133	1.7%	\$1,089,877	3.0%	\$1,100,066	0.9%	\$1,110,255	0.9%	\$1,120,444	0.9%	\$1,130,633	0.9%	10%	1.4%
Graduate, Out-of-State	\$182,837	\$202,613	10.8%	\$206,727	2.0%	\$212,929	3.0%	\$212,929	0.0%	\$212,929	0.0%	\$212,929	0.0%	\$212,929	0.0%	16%	2.2%
Law, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Law, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Dentistry, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Dentistry, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
PharmD, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
PharmD, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Veterinary Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Veterinary Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
First Professional, In-State (Total)	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
First Professional, Out-of-State (Total)	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Other NGF	\$3,093,762	\$2,018,323	-34.8%	\$2,048,598	1.5%	\$2,079,327	1.5%	\$2,079,327	0.0%	\$2,079,327	0.0%	\$2,079,327	0.0%	\$2,079,327	0.0%	-33%	-5.5%
Total E&G NGF Revenue	\$37,235,085	\$37,050,548	-0.5%	\$38,009,050	2.6%	\$39,118,592	2.9%	\$39,467,044	0.9%	\$39,863,964	1.0%	\$40,333,656	1.2%	\$40,803,328	1.2%	10%	1.3%
E&G GF Revenue (assume flat after 2026)	\$55,370,919	\$51,701,345	-6.6%	\$51,701,345	0.0%	\$51,701,345	0.0%	\$51,701,345	0.0%	\$51,701,345	0.0%	\$51,701,345	0.0%	\$51,701,345	0.0%	-7%	-1.0%
E&G Tuition Offset Waiver	\$1,826,200	\$1,591,000	-12.9%	\$1,591,000	0.0%	\$1,591,000	0.0%	\$1,591,000	0.0%	\$1,591,000	0.0%	\$1,591,000	0.0%	\$1,591,000	0.0%	-13%	-2.0%
Total E&G Revenue	\$94,432,204	\$90,342,893	-4.3%	\$91,301,395	1.1%	\$92,410,937	1.2%	\$92,759,389	0.4%	\$93,156,329	0.4%	\$93,626,001	0.5%	\$94,095,673	0.5%	0%	-0.1%

Auxiliary Revenue	2024-2025 (Actual)	2025-2026 (Estimated)	Chg	2026-2027 (Planned)	Chg	2027-2028 (Planned)	Chg
	Total Revenue	Total Revenue		Total Revenue		Total Revenue	
In-State undergraduates	\$13,033,149	\$13,484,061	3.5%	\$14,066,890	4.3%	\$14,673,032	4.3%
All Other students	\$5,092,528	\$5,235,275	2.8%	\$5,447,579	4.1%	\$5,668,376	4.1%
Total non-E&G fee revenue	\$18,125,677	\$18,719,336	3.3%	\$19,514,469	4.2%	\$20,341,408	4.2%
Total Auxiliary Revenue	\$52,893,734	\$50,547,068	-4.4%	\$51,943,282	2.8%	\$53,352,568	2.7%

Part 2: Revenue: 2024-25 through 2031-32
University of Mary Washington

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.

Part 3: Financial Aid Plan: 2025-26 through 2031-32
University of Mary Washington

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	\$24,771,148	\$6,471,613	26.1%	\$6,471,613	\$0	\$2,561,470	\$27,332,618	33.0%	\$0 Compliant
Undergraduate, Out-of-State	\$8,162,186	\$2,221,627	27.2%	\$2,221,627	\$0	\$361,554	\$8,523,740	30.3%	
Graduate, In-State	\$1,025,152	\$16,749	1.6%	\$16,749	\$0	\$222,743	\$1,247,895	19.2%	
Graduate, Out-of-State	\$182,837	\$6,500	3.6%	\$6,500	\$0	\$43,458	\$226,295	22.1%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$34,141,323	\$8,716,489	25.5%	\$8,716,489	\$0	\$3,189,225	\$37,330,548	31.9%	

2025-26 (Estimate)									Compliance with § 4-5.1.a.i
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	
Undergraduate, In-State	\$25,468,005	\$6,236,634	24.5%	\$6,236,634	\$0	\$2,625,507	\$28,093,511	31.5%	\$0 Compliant
Undergraduate, Out-of-State	\$8,321,521	\$2,140,961	25.7%	\$2,140,961	\$0	\$370,593	\$8,692,114	28.9%	
Graduate, In-State	\$1,040,086	\$16,141	1.6%	\$16,141	\$0	\$228,312	\$1,268,398	19.3%	
Graduate, Out-of-State	\$202,613	\$6,264	3.1%	\$6,264	\$0	\$44,544	\$247,157	20.6%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$35,032,225	\$8,400,000	24.0%	\$8,400,000	\$0	\$3,268,956	\$38,301,181	30.5%	

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	\$26,122,596	\$6,375,044	24.4%	\$6,375,044	\$0	\$2,704,272	\$28,826,868	31.5%	\$0 Compliant
Undergraduate, Out-of-State	\$8,572,995	\$2,140,961	25.0%	\$2,140,961	\$0	\$381,711	\$8,954,706	28.2%	
Graduate, In-State	\$1,058,133	\$16,141	1.5%	\$16,141	\$0	\$235,161	\$1,293,294	19.4%	
Graduate, Out-of-State	\$206,727	\$6,264	3.0%	\$6,264	\$0	\$45,881	\$252,608	20.6%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$35,960,452	\$8,538,410	23.7%	\$8,538,410	\$0	\$3,367,024	\$39,327,476	30.3%	

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	\$26,906,274	\$6,655,085	24.7%	\$6,655,085	\$0	\$2,785,400	\$29,691,674	31.8%	\$0 Compliant
Undergraduate, Out-of-State	\$8,830,185	\$2,140,961	24.2%	\$2,140,961	\$0	\$393,162	\$9,223,347	27.5%	
Graduate, In-State	\$1,089,877	\$16,141	1.5%	\$16,141	\$0	\$242,216	\$1,332,093	19.4%	
Graduate, Out-of-State	\$212,929	\$6,264	2.9%	\$6,264	\$0	\$47,257	\$260,186	20.6%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$37,039,265	\$8,818,451	23.8%	\$8,818,451	\$0	\$3,468,035	\$40,507,300	30.3%	

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	\$27,074,829	\$6,655,085	24.6%	\$6,655,085	\$0	\$2,785,400	\$29,860,229	31.6%	\$0 Compliant
Undergraduate, Out-of-State	\$8,999,893	\$2,140,961	23.8%	\$2,140,961	\$0	\$393,162	\$9,393,055	27.0%	
Graduate, In-State	\$1,100,066	\$16,141	1.5%	\$16,141	\$0	\$242,216	\$1,342,282	19.2%	
Graduate, Out-of-State	\$212,929	\$6,264	2.9%	\$6,264	\$0	\$47,257	\$260,186	20.6%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$37,387,717	\$8,818,451	23.6%	\$8,818,451	\$0	\$3,468,035	\$40,855,752	30.1%	

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	\$27,243,384	\$6,655,085	24.4%	\$6,655,085	\$0	\$2,785,400	\$30,028,784	31.4%	\$0 Compliant
Undergraduate, Out-of-State	\$9,218,089	\$2,140,961	23.2%	\$2,140,961	\$0	\$393,162	\$9,611,251	26.4%	
Graduate, In-State	\$1,110,255	\$16,141	1.5%	\$16,141	\$0	\$242,216	\$1,352,471	19.1%	
Graduate, Out-of-State	\$212,929	\$6,264	2.9%	\$6,264	\$0	\$47,257	\$260,186	20.6%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$37,784,657	\$8,818,451	23.3%	\$8,818,451	\$0	\$3,468,035	\$41,252,692	29.8%	
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	\$27,411,939	\$6,655,085	24.3%	\$6,655,085	\$0	\$2,785,400	\$30,197,339	31.3%	\$0 Compliant
Undergraduate, Out-of-State	\$9,509,017	\$2,140,961	22.5%	\$2,140,961	\$0	\$393,162	\$9,902,179	25.6%	
Graduate, In-State	\$1,120,444	\$16,141	1.4%	\$16,141	\$0	\$242,216	\$1,362,660	19.0%	
Graduate, Out-of-State	\$212,929	\$6,264	2.9%	\$6,264	\$0	\$47,257	\$260,186	20.6%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$38,254,329	\$8,818,451	23.1%	\$8,818,451	\$0	\$3,468,035	\$41,722,364	29.4%	
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	\$27,580,494	\$6,655,085	24.1%	\$6,655,085	\$0	\$2,785,400	\$30,365,894	31.1%	\$0 Compliant
Undergraduate, Out-of-State	\$9,799,945	\$2,140,961	21.8%	\$2,140,961	\$0	\$393,162	\$10,193,107	24.9%	
Graduate, In-State	\$1,130,633	\$16,141	1.4%	\$16,141	\$0	\$242,216	\$1,372,849	18.8%	
Graduate, Out-of-State	\$212,929	\$6,264	2.9%	\$6,264	\$0	\$47,257	\$260,186	20.6%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$38,724,001	\$8,818,451	22.8%	\$8,818,451	\$0	\$3,468,035	\$42,192,036	29.1%	

* Please note that the totals reported here will be compared with those reported by the financial aid office on the institution's annual S1/S2 report. Since the six-year plan is estimated and the S1/S2 is "actual," the numbers do not have to match perfectly but these totals should reconcile to within a reasonable tolerance level. Please be sure that all institutional offices reporting tuition/fee revenue used for aid have the same understanding of what is to be reported for this category of aid.

Part 4: ACADEMIC-FINANCIAL PLAN: 2026-27 through 2031-33
University of Mary Washington

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	\$85,903,427
Total Estimated 2025-26 E&G Expenditures	\$92,243,393

2026-2027 (Auto-calculated)
Implied GF share
55.8%

2027-2028 (Auto-calculated)
Implied GF share
55.8%

Incremental amounts relative to 2025-26 estimated baseline

		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	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)		
Salary & benefit increases for existing employees															
2% annual state salary increase cost		\$1,080,723	\$0	\$470,577	\$610,146	\$2,183,062	\$0	\$950,564	\$1,232,498	\$3,307,449	\$4,454,324	\$5,624,136	\$6,817,345	Estimated inflation on contracts and utilities. UMW is working on efforts to reduce utility cost, which if reflected in lower future increases.	
1% annual state health insurance increase cost		\$94,992	\$0	\$49,515	\$45,477	\$189,984	\$0	\$99,029	\$90,955	\$287,029	\$385,044	\$484,040	\$584,025		
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Inflationary non-personnel cost increases															
Contractual services and Utilities		\$300,000	\$0	\$300,000	\$0	\$600,000	\$0	\$600,000	\$0	\$700,000	\$800,000	\$900,000	\$1,000,000		
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Financial aid expansion															
Add'l In-State Student Financial Aid from Tuition Rev	Affordable	\$138,410	\$0	\$138,410	\$0	\$418,451	\$0	\$418,451	\$0	\$0	\$0	\$0	\$0		
Add'l Out-of-State Student Financial Aid from Tuition Rev	Affordable	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		

Part 4: ACADEMIC-FINANCIAL PLAN: 2026-27 through 2031-33
University of Mary Washington

		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														
MS AI in Business	Transformative	\$243,500	\$243,500	\$0	\$0	\$243,500	\$243,500	\$0	\$0	\$0	\$0	\$0	\$0	A3
MS in Counseling	Transformative	\$63,500	\$63,500	\$0	\$0	\$63,500	\$63,500	\$0	\$0	\$0	\$0	\$0	\$0	A3
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other academic & student support strategies & initiatives														
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other non-academic strategies & initiatives														
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Additional Funding Need		\$1,921,125	\$307,000	\$958,502	\$655,623	\$3,698,497	\$307,000	\$2,068,044	\$1,323,453	\$4,294,478	\$5,639,368	\$7,008,176	\$8,401,370	

Auto Check Match=0 (Must not be greater than Incremental Tuit Rev in Part 2). If not match, please provide explanations	
2026-2027	2027-2028
\$0	\$0

Part 6: General Fund (GF) Requests in 2026-2028 Biennium
University of Mary Washington

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	Continuation of one-time operating and financial aid funds	OTHER (Please specify in description)	\$1,405,300	\$1,405,300	\$1,405,300	\$1,405,300	UMW appreciates the Commonwealth's support provided in the conference report and used it as it was intended in order to minimize tuition and fee increases. The expenses these funds support are not one-time in nature. Without continued funding, UMW will have to weigh further tuition increases in its annual budget process. Narrative D8
2	Continuation of nursing program support	Curriculum	\$740,000	\$740,000	\$740,000	\$740,000	UMW appreciates the one-time funding provided in the current biennium to support the MS in Nursing, but this funding is supporting positions to develop a crucial program designed to support a critical need for healthcare workers in the Fredericksburg region and we request that it continues. Narrative A3, D8
3	VMSDEP	OTHER (Please specify in description)	\$1,430,048	\$1,430,048	\$1,430,048	\$1,430,048	This amount represents the difference between UMW's share (using SCHEV's calculations from FY25) of the ongoing base \$65M in the budget and the current total revenue waived as part of the program. The request is to fully fund the program, which would likely involve larger investments as the program continues to grow quickly. Narrative D2, J1.
4	Master of Science in AI in Business	Curriculum	\$400,000	\$400,000	\$400,000	\$400,000	Anticipated start- Fall 2026. Existing resources are being utilized to help develop the program, with this request being associated with the faculty to deliver it. Narrative A3
5	Master of Science in Counseling	Curriculum	\$0	\$0	\$450,000	\$450,000	Anticipated start- Fall 2027. Existing resources are being utilized to help develop the program, with this request being associated with the faculty to deliver it. Narrative A3
6	Technology Infrastructure-ERP	Technology Infrastructure	\$3,500,000	\$3,500,000	\$0	\$0	The technology infrastructure support provided in the current biennium can be utilized by UMW to address many technology needs. The specific request and need was centered around replacing the university's ERP system that supports the institution's finance, HR and student data and processes. This type of effort would require one-time investment over a 3-4 year period in order to fully implement. Narrative A3
			\$7,475,348	\$7,475,348	\$4,425,348	\$4,425,348	

Part 5: Six-year Pro Forma Calculations: 2024-25 through 2031-32
University of Mary Washington

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	57,197,119	53,292,345	-7%	53,947,968	1%	54,615,798	1%	55,469,503	2%	56,879,149	3%	58,315,490	3%	59,952,476	3%	5%	1%
Tuition discount rate	31.9%	30.5%	-1.4%	30.3%	-0.2%	30.3%	0.1%	30.1%	-0.3%	29.8%	-0.3%	29.4%	-0.3%	29.1%	-0.3%	4%	-1%
Total E&G NGF Revenue	37,235,085	37,050,548	0%	38,009,050	3%	39,118,592	3%	39,467,044	1%	39,863,984	1%	40,333,656	1%	40,803,328	1%	10%	1%
Incremental E&G NGF Revenue vs. prior yr		(184,537)	%	958,502	-619%	1,109,542	16%	348,452	-69%	396,940	14%	469,672	18%	469,672	0%	-355%	-51%
Total E&G Revenue	94,432,204	90,342,893	-4%	91,957,018	2%	93,734,390	2%	94,936,547	1%	96,743,133	2%	98,649,146	2%	100,755,804	2%	12%	2%
Implied GF % of E&G	60.6%	59.0%	-1.6%	58.7%	-0.3%	58.3%	-0.4%	58.4%	0.2%	58.8%	0.4%	59.1%	0.3%	59.5%	0.4%	1%	0%
Total E&G Expenditures	85,903,427	92,243,393	7%	93,857,518	2%	95,634,890	2%	96,230,871	1%	97,575,761	1%	98,944,569	1%	100,337,763	1%	17%	2%
Incremental E&G Expenditures vs. 2025-26				1,921,125		3,698,497	93%	4,294,478	16%	5,639,368	31%	7,008,176	24%	8,401,370	20%	337%	48%
Reallocation of existing dollars (flat after 2027-28)				307,000		307,000	0%	307,000		307,000		307,000		307,000	0%	0%	0%
Pro Forma Surplus/Deficit	8,528,777	(1,900,500)	-122%	(1,900,500)	0%	(1,900,500)	0%	(1,294,324)	-32%	(832,628)	-36%	(295,423)	-65%	418,041	-242%	-122%	-17%
Incremental Surplus/Deficit	8,528,777	(10,429,277)	-222%	0	-100%	0	-196%	606,176	223526258%	461,697	-24%	537,205	16%	713,464	33%	-251441057%	-35920151%

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		60.6%		60.6%	0%	60.6%	0%	60.6%	0%	60.6%	0.0%	60.6%	0.0%	60.6%	0.0%	60.6%	0.0%	0%	0%
Implied incremental T&F increase (%)		-223%		-9.0%	-223%	0.0%	-100%	-9.0%	-193%	-0.6%	-0.5%	-0.6%	-0.1%	-0.7%	-0.1%	-0.7%	-0.2%	-106%	-15%
Implied incremental GF increase (%)		-9.0%		11.9%	-231.2%	0.0%	-100.0%	0.0%	-194.4%	-0.7%	-0.7%	-0.5%	0.2%	-0.6%	-0.1%	-0.7%	-0.2%	-106.1%	-15%

Blended Scenario Calculator - Share of Deficit Covered by Each Source (Must add up to 100%)	Expenditure reductions	0%	<< Input percentages here														
	T&F increases	0%															
	GF increases	0%															
	TOTAL	0%															
	2024-2025 (Actual)	2025-2026 (Est.)	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	2030-2031	Chg	2031-2032	Chg	Total Chg	Avg Annual Chg
Implied E&G Expenditure Reduction (%)	0.0%	0.0%	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied incremental T&F increase (%)	0.0%	0.0%	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied incremental GF increase (%)	0.0%	0.0%	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied GF % of E&G	60.6%	59.0%	-2.6%	58.7%	-0.5%	58.3%	-0.7%	58.4%	0.3%	58.8%	0.6%	59.1%	0.5%	59.5%	0.7%	0.9%	0%

Part 7: E&G Capital Requests in 2026-2028 Biennium
University of Mary Washington

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

E&G Capital Projects Requests Biennium 2026-2028 (7/1/26-6/30/28) ☐										
Priority Ranking	Capital Project / Building	Category (Select best option from dropdown menu)	Facility Condition Index (for renovation projects only) if available	2026-2027			2027-2028			Notes/Explanation Please be brief; reference specific justification, alternatives and additional fund sources.
				Total Amount	NGF Support	GF Support	Total Amount	NGF Support	GF Support	
1	Simpson	Improvements-Life Safety Code	0.72		\$0	\$2,145,000	\$0	\$0	\$0	UMW will be completing structural work this summer on Simpson library to maintain the safety and security of the existing building. A structural study performed as part of this work points to larger renovations needed to be able to continue utilizing the building over the long term. This request is to conduct a feasibility study to more fully develop the best approach, renovation or replacement and detailed cost estimates, for UMW to have a modern learning resource center facility that supports the needs of students for decades to come. This study is a prudent first step to identify long-term solutions and inform capital planning.
2	Deferred Maintenance	Improvements-Other			\$0	\$17,550,000	\$0	\$0	\$0	This is Life Safety Code, Infrastructure Repair and Accessibility work. JLARC's report notes UMW as having the second oldest facilities of public four years. UMW has made targeted investments to upgrade infrastructure with its own funds and has appreciated state support for critical life safety and accessibility projects. There is still more work to be done beyond what Maintenance Reserve can address in UMW E&G buildings related to accessibility for items like aging elevators that need replaced; critical life safety for roofs, HVAC and building envelope repairs to protect our buildings and inhabitants; and other infrastructure like plumbing and wiring. This request makes up the total of a variety of projects across campus designed to extend the life of our E&G buildings serving the instructional needs of our students. Without investment we will continue in an environment with significant deferred maintenance leading to reactionary work and costs. This takes into account available critical life safety money already slated towards projects as well as an estimate of \$2M per year in maintenance reserve funding for the FY27-28 biennium.
					\$0	\$19,695,000	\$0	\$0	\$0	

Part 8: Degree/Certificate Programs in 2026-2028 Biennium
University of Mary Washington

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)
MS	Nursing	Establish	51.3801	Fall 2026	The Commonwealth has allocated \$740,000 in FY2025 to initiate this program. It is being established to support area workforce needs and student demand.
MS	Artificial Intelligence in Business	Establish	52.1301	Fall 2026	This program is possible using existing faculty and resources and will only require two new FTE at \$400,000.
BIS	Interdisciplinary Studies	Establish	30.9999	Fall 2026	UMW needs to provide an alternative for a bachelor's that takes advantage of a broader range of disciplinary opportunities than those that fit under the BLS/liberal arts and studies.
MS	Counseling	Establish	13.1101	Fall 2027	This program is being built by UMW's clinical psychology faculty and will require 3 additional FTE to initiate at \$450,000 in FY 2026 for a first class in Fall 2027.
BA	Art History	Close	50.0703	teach out to begin fall 2026	Low enrollments have made this too difficult to staff as a stand-alone degree program.
BA	Classics	Close	16.1200	teach out to begin fall 2026	Low enrollments have made this too difficult to staff as a stand-alone degree program.
CERT	Cybersecurity Management	Establish	52.1201	Fall 2027	This certificate is stackable with the MS in AI in Business
CERT	Healthcare Analytics and AI	Establish	51.2706	Fall 2027	This certificate is stackable with the MS in AI in Business
CERT	AI in Business	Establish	52.1301	Fall 2027	This certificate is stackable with the MS in AI in Business
CERT	Entrepreneurial Leadership	Establish	52.0701	Fall 2028	This certificate is stackable with the MS in AI in Business

2025 SIX-YEAR PLAN NARRATIVE (Part II)

INSTITUTION: University of Mary Washington

OVERVIEW

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

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

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

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

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

SECTION A: MISSION & PRIORITIES

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

A1. Describe how your institutional strategic plan goals align to your institutions mission. Please share any plans you have to change your mission over the six-year period.

UMW is the only four-year institution serving the greater Fredericksburg region -- one of Virginia's fastest growing -- with significant workforce needs. UMW meets its mission by focusing on teaching and learning in programs which meets those needs while remaining true to the liberal arts and our commitment to preparing graduates for the many career transitions they will face, rather than just having the credentials to realize their first job.

As described in our 2023 six-year plan, UMW anticipated working through a process to make its mission statement more succinct and contemporary. After full consideration by various constituencies, UMW's Board of Visitors modified the institution's mission statement in July 2024. The request for this change is working through the approval process.

The old statement can be found [here](#). The new statement is as follows:

Located in Fredericksburg, Virginia, the University of Mary Washington is a premier public liberal arts and sciences university where teaching and learning are the foundation of a community dedicated to the creation and exploration of knowledge through free inquiry, integrity, and service. We prepare engaged and thriving citizens.

As we also reported in our 2023 six-year plan, the workforce needs are particularly acute in healthcare. UMW has been asked by regional actors, including Mary Washington Healthcare, to address the region's dire health care situation (an insufficient number of healthcare professionals where the service area now exceeds 500,000). UMW has since been engaged in feasibility studies and expects to advance several programmatic elements over the next two years. Doing so may involve changes to our accreditation and degree-granting authority.

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?

In 2025-26, UMW is preparing to embark on a new strategic planning process using the priorities outlined in this document to guide our effort. UMW's greatest strengths continue to be those that have guided us over the past decade:

- Our commitment to service, community, and civic engagement and meeting the needs of our region as the only four-year institution serving the greater Fredericksburg region. Founded as a normal school, UMW continues its focus on serving the region and promoting community and civic engagement.
- Our commitment to applied, impactful learning experience, especially internships, undergraduate research, and other forms of work-based learning. We do so based upon a rich history of extending the classrooms with learning experiences that supplement classroom instruction.
- Our commitment to a 21st century liberal arts education within the context of a rapidly changing knowledge economy and a global digital environment. We do so based upon our long-time commitment to digital fluency and providing students with the career-ready workforce skills irrespective of major.

Programmatically, our strengths include a general education program which equips all students with 21st century knowledge and durable skills and is distinctive in its focus on digital fluency and career readiness. We have a strong and growing portfolio of degree programs including those in STEM (with distinctive undergraduate research opportunities), the fine and performing arts (Music, Studio Art, and Theatre) which will continue to grow in alignment with the construction of the new theatre and the renovation of the fine arts building (duPont, Pollard and Melchers), Communication and Digital Studies (combining classical perspectives with advanced and emerging digital technologies), Historic Preservation (a unique program and one that is important to the Commonwealth and beyond), a Bachelor's of Science in Nursing and a Master's of Science in Nursing, and thriving offerings in business which serve regional economic needs.

To these strengths, we add one more. We are geographically situated between Washington, DC, and Richmond, VA, in the greater Fredericksburg region, which is by some estimates, Virginia's fastest growing region for both job and population growth. Our region also includes several federal facilities and bases, such as the Naval Surface Warfare Center Dahlgren Division, the largest federal lab in Virginia with 10,000 employees and a rapidly expanding health care sector which includes Mary Washington Healthcare and the Veterans Administration clinic (projected to be the largest on the east coast). We are the only four-year degree granting institution serving the region and a critical driver of both economic and cultural life.

Our greatest opportunities for improvement include (1) creating new projects that support workforce needs, particularly in health care, (2) enhancing competitive differentiators (especially at the advent of the AI era where a liberal arts approach has something significant to contribute) by adequately supporting the continued growth of strong programs while transforming those with the potential to meet workforce needs, (3) enhancing name and brand recognition relative to the Virginia higher education landscape, (4) securing capital investments to bring our facilities in alignment with competitors, (5) diversifying the revenue

base, and (6) growing our partnerships and collaborations for the benefit of our students and the region.

This six-year plan details UMW's ambition to be Virginia's undergraduate university that prepares students for life and career through close personal relationships and applied learning experiences. The liberal arts perspective of our curriculum is a crucial complement to all degrees, including those in high-demand fields, because it provides students with the knowledge and durable skills to move from college to their first career destination while preparing them to succeed in the many transitions to come.

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.

UMW is deeply committed to its mission of fostering teaching and learning in support of the greater Fredericksburg region, where the community converges to explore and create knowledge, and to producing citizens who lead productive lives.

1. Meeting future workforce needs of the region and Commonwealth

To truly serve the greater Fredericksburg region, one of Virginia's fastest growing regions, the University must actively support the local and state workforce, focusing on areas of critical need. We know that healthcare is the region's most pressing need and we have been asked by the local healthcare system to address this challenge by partnering to bring medical education to the region. In the University announced in its 2023 six-year plan its intention to conduct a healthcare feasibility study which is now complete and includes plans for a number of new academic programs. These include nursing, mental health, physical therapy and social work. Furthermore, the burgeoning demand for skills in data science and other high-need sectors requires expanded and innovative offerings. This priority directly addresses Goal 3 (transformation) of the current statewide strategic plan and the relevance of our educational programs to regional economic vitality and healthcare access, ensuring our graduates are ready to step into essential roles and that the university is responsive to the evolving demands of critical industries. *This priority includes establishing:*

- *New academic programs such as Master of Science in Nursing, Master of Science in Counseling, Master of Science in AI for business, as well as certificates for working professionals in areas such as artificial intelligence, cybersecurity, entrepreneurship, and health care, and exploring an MD program for primary and community care physicians.*

- *Continue to invest in providing industry standard credentials for all students, employees, and alumni supporting the acquisition of industry standard credentials and skills as a complement to a UMW degree.*

2. Enhancing and adapting UMW's liberal arts mission

Our commitment to preparing citizens for productive lives necessitates an innovative curriculum that thoughtfully integrates the timeless value of the liberal arts with essential career readiness skills and the latest advances in technology. This means deliberately fostering critical thinking, effective communication, collaborative teamwork, and strong leadership abilities across all disciplines. Moreover, the curriculum must embrace and leverage new technologies, especially artificial intelligence, building upon the University's existing strengths and leadership in the digital humanities. This priority directly addresses Goal 1 (equitable) of the current statewide strategic plan, particularly as it utilizes strategies to advance access and strengthen student support services. By doing so, we ensure our students are ready not just for their first job, but for a lifetime of adaptability, and that our educational offerings remain profoundly relevant to the demands of a rapidly advancing world, demonstrating clear responsiveness to technological innovation.

In addition, given the University's commitment to experiential learning, a core strategic priority for the university must be ensuring that students have ample opportunities to engage in undergraduate research and meaningful work-based learning experiences. This priority directly underpins the institution's mission of fostering knowledge exploration and creation while producing productive citizens for the greater Fredericksburg region. It is bolstered by a combination of resources and programmatic opportunities including our 2023 Quality Enhancement Plan (Life After Mary Washington), support from the Commonwealth through V-TOP, and the \$36 million endowed gift supporting undergraduate research in STEM fields. Our focus on undergraduate research and work based-learning experiences connects all three goals (equitable, affordable, transformative) of the current statewide strategic plan. By emphasizing undergraduate research, we cultivate students' readiness to learn through hands-on inquiry, develop critical thinking skills essential for career readiness, and instill a sense of intellectual curiosity vital for engaged citizenship. Concurrently, work-based learning experiences ensure the relevance of education by directly addressing student and family needs for practical skills and career pathways, while demonstrating accountability to taxpayers by preparing a workforce capable of contributing to the regional economy. Furthermore, these experiences build responsiveness to the evolving landscape of technology, industry demands, and the pervasive influence of artificial intelligence, ensuring our graduates are equipped to adapt to changing political and economic circumstances and lead fulfilling, productive lives. *This priority involves strategies that include:*

- *Securing and implementing enterprise-level AI tools for students and employees*
- *Creation of a Center for AI and Liberal Arts*
- *Explore the development of a Humanities Center\ Establish an Office of Undergraduate Research*
- *Completion of the Life After Mary Washington Quality Enhancement Plan*
- *Expand the Summer Science Institute and implement other programs and scholarships associated with the \$36 million gift.*

3. Student engagement, campus life, and school pride

Student success depends crucially on the degree to which students engage with and are supported by the campus. In order to meet our responsibility to the community to ensure broad access to high-quality education and to champion the success of every student, it is important that we invest in all aspects of the student experience. This involves not only attracting a student body reflective of the region but also providing an attractive and engaging campus in addition to providing comprehensive support systems, academic resources, and inclusive learning environments that empower students to thrive. Our focus on access and success falls under Goal 1 (equitable) of the current statewide strategic plan and ensures that students are truly ready to learn, regardless of their prior circumstances, and that the university remains relevant to the aspirations of families and the broader community seeking upward mobility. It also demonstrates our responsiveness to the societal imperative educational opportunities. UMW is committed to containing costs and enhancing affordability for students and families. This requires rigorous evaluation of operational efficiencies, innovative delivery models for education, and a relentless pursuit of strategies that minimize the financial burden on students while maintaining academic excellence. The Virginia Pell initiative has been especially crucial as we have been able to grow our support for Pell-eligible students through dedicated personnel, additional support services, and new financial support to close the affordability gap. Our focus on cost containment and affordability falls under Goal 2 (affordable) of the current statewide strategic plan. By making education more affordable, we enhance access and ensure our programs are relevant to the economic realities faced by prospective students and taxpayers who invest in public higher education. This proactive approach demonstrates our responsiveness to the economic challenges faced by our community and reinforces our commitment to providing a valuable education at a sustainable cost. Current or anticipated strategies which fall under this priority include:

- *Implementing a comprehensive approach to health and wellness for all UMW community members.*
- *Sustain and grow the Pell In Virginia Initiatives, including STARS (Student Transition, Access, Retention and Success) and Eagles in Flight.*
- *Invest in school pride and other aspects of campus life through traditions, experiences and cultural norms to create an institution where students are eager to apply, enroll, and remain.*

4. Modernizing Infrastructure and Creating a 21st-Century Campus

According to the Joint Legislative Audit and Review Commission “Mary Washington has the second oldest campus facilities of the state’s public four-year institutions.”¹ Consequently, a pivotal strategic priority for the university must be modernizing infrastructure and creating a 21st-century campus. This endeavor is fundamental to upholding our mission of fostering teaching and learning, cultivating knowledge, and producing productive citizens for the greater Fredericksburg region. Our focus on modernizing infrastructure and creating a 21st-century campus involves all three goals (equitable, affordable, transformative) of the current

¹ Joint Legislative Audit and Review Commission, *High Education Institutional Viability*. JLARC Report 593. Richmond, VA: Commonwealth of Virginia, October 7, 2024. <https://jlarc.virginia.gov/pdfs/reports/Rpt593.pdf>.

statewide strategic plan. A modernized campus ensures student readiness and institutional success on multiple fronts: readiness to learn is enhanced by access to cutting-edge technology and dynamic learning environments, readiness for careers is built through exposure to industry-standard tools and collaborative spaces, and readiness for citizenship is solidified by fostering digital literacy and an understanding of contemporary societal needs. This investment is highly relevant to all stakeholders, addressing student and family needs for a state-of-the-art educational experience and demonstrating to taxpayers a commitment to innovation and regional economic vitality. Furthermore, a modern infrastructure ensures the university's responsiveness to rapid technological advancements, the integration of artificial intelligence, and evolving industry demands, thereby preparing graduates to thrive in an ever-changing world and contribute meaningfully to the community. Current or anticipated strategies which fall under this priority include:

- *Improvements to infrastructure and facilities including addressing deferred maintenance, increasing energy efficiency, and updates to or replacement of the enterprise resource planning (ERP) software system.*
- *Modernizing classrooms, the library and other learning spaces such as technology-rich studios and labs to support online and hybrid instruction, design thinking and active learning in labs.*
- *Enhance support for online and hybrid instruction.*

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.

UMW's Board of Visitors has received regular reports on the Pell Initiative for Virginia. These reports are received during the Board's scheduled meetings in September, November, February, and April and are part of the Academic Affairs written report. President Paino also provides updates as part of his President's Report when appropriate at executive committee meetings.

The Pell Initiative for Virginia is administered through the Office of the Provost by the Dean of Admissions and the Associate Provost and University Registrar. The University-wide Recruitment and Retention Council receives regular reports on implementation, goals, progress on those goals, and actions to address program gaps. The Council includes the Provost, the Chief of Staff and Vice President for Strategy, the Vice President for Administration and Finance, the Vice President for Student Affairs, the Dean of Students, the Associate Provost for Institutional Analysis and Effectiveness, and several others in key leadership positions at the University.

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](#)).

The primary drivers of recent enrollment trends for UMW are as follows:

- **Shifting demographics.** Demographic changes and economic forces have been impacting UMW long before there was talk of a “demographic cliff.” Over two decades, UMW has become more Virginia-serving and has been substantially impacted by declining out-of-state enrollments linked to increases in out-of-state tuition, economic downturns and declining birth rates, especially in the Northeast.
- **Increased competition.** With reduced out-of-state enrollments, the competition among Virginia institutions has increased significantly. This is especially so with flagships and land grants which have seen record enrollments. But it is also true with respect to direct competitors which have newer facilities.
- **Growing cost of attendance and questioning of ROI.** While the cost of attendance has increased (unfunded mandates, compliance and regulatory costs, student support services such as mental health) the value proposition of a bachelor’s degree is increasingly questioned, especially at a school with a liberal arts brand. More recently, public skepticism is being coupled with a growing partisan divide on the value proposition of higher education.
- **Positive academic programs.** UMW has witnessed enrollment growth in several areas, with clear postgraduate outcomes, including Biology and Biomedical Science, Computer Science and Cybersecurity, Communication and Digital Studies, Nursing and Theatre. Regional workforce needs have also driven growth in graduate programs in business (project management certificate, MBA) through partnerships such as with the Naval Surface Warfare Center at Dahlgren.

Beginning in Fall 2023, we witnessed what we believe is a normalization of our enrollment pattern in which we can expect an incoming undergraduate mix consisting of about 1000 students with a little more than 2/3rds first-year first-time and just under 1/3rd transfer. Given current out-of-state tuition, out-of-state students consist largely of student athletes and Honors students who are willing to pay to compete at their sport or who receive significant

merit awards. Significantly, the Fall 2024 cohort and the projected Fall 2025 cohort have seen UMW lower the acceptance rate from the mid-eighties to the mid-seventies. The majority of students do not declare their program at entry (first-year, first-time students are not permitted to do so until the end of the first year).

Looking ahead, given demographic trends, future enrollment growth will need to come from new programs focused on specific populations at both the undergraduate (adult degree) and graduate (nursing, counseling) level.

Finally, and potentially significantly, we are not yet able to project the impact of changes in the federal workforce and their consequences for the greater Fredericksburg region. Such changes could impact our enrollment projections.

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.

UMW's enrollment management strategy moving forward is focused on enrolling a stable and predictable number of undergraduate first-year and transfer students who are seeking what UMW has to offer (high-quality undergraduate education) and who are able and willing to pay sufficient net tuition revenue to maintain financial stability and support strategic investments. UMW is committed to keeping the cost of attendance as low as possible. An important aspect of this strategy will be enrollment growth within our own community through a limited number of new programs (both graduate and undergraduate) to address a variety of regional workforce needs,

- **Strategic recruitment planning.** In 2021-2022, following a decline in first-year students, UMW engaged in a strategic planning exercise that looked at all aspects of enrollment operations and organizational structure. The Office of Admissions has been reorganized, operations have been aligned with recruitment priorities, the data management team has been strengthened, internal yield activities have been overhauled and expanded, and recruitment is being aligned with projected demographic shifts (e.g., development of Spanish language resources). In 2024-2025, further adjustments to recruitment strategy included new external partner alignment with the goal of better positioning the university to achieve enrollment targets and reduce the discount rate.
- **Marketing and Branding** – For the past three years, UMW's marketing has been year-round, sustained, and strategic, with adjustments made for the audience and season. In FY 2025, UMW budgeted just over \$1.2 million for marketing – across all channels from out-of-home tactics to a dynamic digital campaign, spanning search and social media and including current and prospective audiences. In addition, \$400,000 supports continuing updates and upgrades to the UMW website, including interactive tools such as a virtual tour and areas of study search feature. We also partner with college search guides and a family newsletter platform. We focus on audience engagement and conversions into applications, lifelong connections, and

tracking return on investments, all while building the brand through all of our audiences – from admissions through athletics and alumni engagement.

- **Exploring new markets.** Out-of-state enrollments (primarily from the Northeast) have declined steadily over the last two decades and represent little more than 10% of the incoming class today. UMW seeks to shift and enhance recruitment efforts in markets with projected population growth.
- **Serving more students in high-growth programs.** Programmatic alignment will provide UMW an opportunity to reallocate resources from low-demand programs to high-demand programs. At present, the institution's capacity to recruit more students into high-demand programs is limited (and doing so would be irresponsible insofar as it would delay time to graduation). For AY 25-26, UMW has worked to allocate to support growth in Biological Sciences and Computer Science with additional full-time faculty hires.
- **Demonstrating the ROI for a bachelor's degree.** Sustainable enrollments in high quality undergraduate programs require a strong case, clearly communicated, for the benefits of a bachelor's degree. Our focus on career readiness and the core competencies necessary for success in life through our QEP is positioned to achieve this end.
- **New Programs.** UMW promised the Op-Six in 2023 that it would conduct a feasibility study to understand how UMW could better meet regional workforce needs, particularly in the area of health and human development. That study is now complete and is the basis for our approach to new programs, including a Master of Science in Nursing.
- **Industry Credentials.** In addition to UMW's degree programs and an assortment of majors and minors, starting in fall 2025, all UMW students will have the opportunity to "accessorize" their degree with industry credentials. Students can earn professional certificates alongside their coursework and develop job-ready skills.

UMW has been realistic about its enrollment projections for the past several years, as reflected in previous six-year plans. We do not see opportunities for significant growth given all that we know about demographic factors, competition among Virginia colleges and universities, shifting workforce needs, and constraints on new program growth.

The greatest unknowns and risks include: (1) demographics, (2) competition, (3) unknown future disruptions, including economic downturns and the consequences of our proximity to Washington, DC, (4) artificial intelligence, (5) industry credentials and certifications that are short-lived and non-transferrable, (6) politicization of higher education.

Nationally, from 2026-2038, the number of high school graduates is expected to decline by more than 400,000 (WICHE, 2023). Projections for Virginia indicate approximately 10,000 fewer high school graduates in 2038 from the peak to be reached in 2025 (WICHE, 2023). Community college partners (Northern Virginia Community College and Germanna Community College) have had relatively stable enrollments over the past decade with some variability from year to year.

Source: WICHE (February 2023), *Knocking at the College Door*,
<https://knocking.wiche.edu/report/>

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).

Fall 2024 and projected Fall 2025 cohorts signal a change in UMW's enrollment fundamentals. We have stabilized new enrollments at about 1000 students while making significant changes to our enrollment strategy. Significantly, this has included strategic efforts to restrain discounting. As we shared in the 2023 six-year plan, the trends were unsustainable. Since then, we have made real progress over the last two cycles while increasing revenue and reducing our acceptance rate.

The most significant limiting factor going forward is having the liquidity to invest in new programs. We project that we will be able to capably manage our financials in accordance with current enrollment projections. What we do not have is the capacity to initiate programs and manage unexpected deferred maintenance.

We continue to be honest about the challenges we face. Cracks in UMW's business model began to show at least 20 years ago with the loss of out of state students, and it is humbling to acknowledge that capable and committed leaders throughout the years made well-meaning but largely inadequate efforts to respond to these challenges. In fact, some of those efforts exacerbated UMW's financial challenges by investing in aspirations that outstripped the University's resources.

But it is also important to understand why those decisions were made. During the first decade of the 21st century, UMW found itself on the wrong side of higher education's arms race. In particular, the Commonwealth was investing hundreds of millions of dollars to create a new direct competitor in an already hyper-competitive marketplace. To compete with both more-established ascendant larger schools like James Madison University and smaller public liberal arts universities, in particular Christopher Newport University, with its impressive new academic buildings, athletic facilities, and residence halls, UMW assumed excessive indebtedness to try to keep pace.

Investments in marketing and student recruitment are a cost of doing business, but costs can only be covered if we incrementally increase demand by employing our strategy of focus, adaption, and collaboration, especially with respect to our region. The Commonwealth has made strategic and significant investments in other schools over the last 25 years with impressive results, so it is exciting to think what is possible if a similar investment is made in UMW.

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](#)).

Measure	Current Rate	Aspirational	Timetable	Realistic Expectation	Qualitative Target
6-year graduation rate	66% (Fall 2018 cohort)	73%	Fall 2024 cohort	73%	best in class six-year graduation rates
6-year graduation rate for Pell students	60% (Fall 2018 cohort)	70%	Fall 2024 cohort	65%	to be recognized as an institution whose graduates realize upward mobility

A different measure that UMW also tracks is the completion rate of entering UMW students who complete a credential (whether here or elsewhere). Students depart (and hence do not graduate) for a variety of reasons. The most significant reasons according to our exit data are financial, academic preparation, health and family concerns, and the decision to pursue a degree elsewhere (sometimes a degree that UMW does not offer). Considering completion data then is an important indicator about the quality of an early UMW experience on future success (even if completion does not happen here). This information is available from the National Student Clearinghouse and the most recent three-year average completion rate for UMW is 80% while the national completion rate during this same time is 73%.

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](#)).

- **Prior completion outcome strategies implemented:** UMW has had a number of completion outcome improvement strategies. (1) The Student Transition Program (STP) which is a summer bridge program with continuous advising and mentoring support through the first year. (2) Overhauled first-year experience for all undergraduates in 2015, with first-semester seminars focused on research, writing, and speaking. (3) A new general education program in fall 2020 that (a) provides students with more flexibility and choice, (b) enhanced opportunities outside the classroom, (c) created the “After Mary Washington” requirement focused on career development, and (d) lowered the language requirement, a barrier to completion for many students. (4) Expanded support for students with disabilities, including enhanced staff support, a dedicated testing center, accessibility improvements, and technology enhancements. (5) Establishment of transfer pathways with community college partners. (6) Reduced student unmet need.
- **Strategies to address:** UMW has examined its data, including the retention and completion rates for underrepresented students, including Pell students, and has determined that greater support – both financial and human – would increase student completion. As part of the Pell in Virginia Initiative, we have identified a number of areas in which progress is possible. We are in year two of an implementation that includes: (1) additional support for unmet need to close existing gaps for first-year students and transfer students, (2) restructuring of the summer bridge program for first-year students to become a comprehensive student support program focused on Pell eligible students across all four years, (3) enhanced staff support focused on retention and financial aid, (4) new emergency assistance funding and support.
- **A new Interdisciplinary Approach to Students in Distress.** Led by the Dean of Students Office and the First-Year Experience Program, staff and faculty members in Student Affairs and Academic Affairs meet weekly to discuss students who are struggling academically, socially, and psychologically. Team members map out specific interventions that are tracked by non-clinical case managers in the Dean of Students office. Information about distressed comes to the team’s attention in several ways, including the Concerned About a Student portal, through which anyone can submit a concern.

As demonstrated by the Fact Pack, UMW’s retention rate has improved steadily from a pandemic low of 79% to 84+%. We expect that this will translate into future graduation rate improvements.

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](#)).

- **Monitor.** UMW monitors post-completion outcomes in several ways including a graduate exit survey, a first destination survey (6 months after graduation) and alumni surveys (5, 10, and 15 years after graduation). As part of our Quality Enhancement Plan, we also track behaviors related to career readiness engagement through the NSSE Career Module. We also monitor post-graduation wages and debt load.
- **Data collection.** UMW collects post-graduation outcomes at several points between graduation and 15 years after graduation. UMW also collects post-graduation wage data from these surveys.
- **Metrics.** We are most closely monitoring the "career outcome rate" six months after graduation. For example, in the Class of 2024 than 85% of students were employed (full-time or part-time), enrolled in a graduate course of study, or are participating in national service (e.g. military, Peace Corps) within six months of graduation. UMW aspires to increase this to 90% or higher by the Class of 2027.
- **Data insights.** UMW students stay in-state at higher rates than the state average and they stay in the region, supporting economic development and providing an important share of the workforce in critical sectors. The Fact Pack also shows that UMW graduates do well with respect to wages in many traditional liberal arts and sciences fields such as English, Psychology, History and Sociology. The largest employers of UMW graduates are Mary Washington Healthcare, the Naval Surface Warfare Center Dahlgren Division, and K-12 education, and the University itself. UMW graduates are entering high growth jobs in the professional, scientific, and technology field that align with the Growth Opportunity Virginia (GOVA) Region 6 priority sector.
- **Program outcomes.** UMW disaggregates career outcome data by academic program. Attached in Appendix B are the combined most recent five years of data for the percentage of graduates who are employed or enrolled in graduate school six-to-twelvemonths after graduation for each academic program.

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.

Prior initiatives. UMW has made significant progress in building the infrastructure necessary to prepare students for career and job attainment. This includes establishing processes to monitor and collect outcomes data (see C.4 above), creating more than 20 different credit-bearing courses focused on career development both generally and within in various disciplines, establishing the Center for Career and Professional Development (following an additional appropriation in FY2019), and bringing our aspirations in the areas of career preparation for students and workforce engagement in the region under a single executive (the Associate Provost for Career and Workforce).

Career readiness initiative. The University seeks to address gaps in our efforts through three new initiatives. (1) We aim to create a systematic and comprehensive strategy for students to engage in programs, activities, and conversations that will show them what it means to be life and career ready and how the entirety of the curricular, cocurricular, and extracurricular liberal arts experience is a powerful force toward that end. This is detailed in the University's Quality Enhancement Plan -- *Life After Mary Washington: Preparing Students for Life and Career* -- which was adopted in 2023 and focuses on ensuring that UMW undergraduates have the core competencies (including well-being skills and mindfulness so essential to mental health) necessary for post-graduation success. (2) We aim to make student employment and the nearly 700 on-campus jobs meaningful components of our overall career readiness agenda. (3) We aim to facilitate and support all students in having work-based learning experiences (e.g. internships and research fellowships) during their undergraduate experience.

To realize success on these three initiatives, the University needs to:

- Establish a campus-wide training and development program so that all employees (faculty and staff) are prepared to have conversations with students about career readiness and students are ready to transfer their UMW experience to life and career after college.
- Develop our capacity for on-campus student employment to support students and campus units in restructuring our approach to on-campus work opportunities. At present, student employment is managed by one person in the office of financial aid and does little to identify or help students articulate the transferable skills available in these positions.
- Enhance our capacity to support experiential learning through internships, research fellowships, and working-based learning. This will require increased administrative support and support for faculty. We need to increase our capacity to manage these opportunities and compensate/release faculty to provide oversight of the credit-bearing aspects of these work-based learning experiences. Should SB 1280 be fully implemented, we anticipate an even greater need for this support.

Existing resources: Existing resources are sufficient to provide (a) administrative oversight and management, (b) the technological systems to support their implementation (e.g. the online job and internship management system), and (c) some personnel support (e.g. 1 FTE in financial aid who manages student employment). Importantly, resources provided by the V-TOP initiative have been especially valuable in building capacity to support work-based learning experiences.

Alumni Network. A partnership with Advancement and Alumni Engagement has made Life After Mary Washington a shared goal, empowering alumni to play an active role. In 2022, the Alumni Association Board of Directors created a Career Connections Committee and launched a pilot program, now expanding, called Network Mary Washington. This digital platform connects students, recent graduates, and alumni with UMW's 45,000+ alumni, helping users explore majors, identify career paths, and secure internships and job opportunities. This collaboration also enabled UMW to quickly organize a career transitions workshop for federal employees affected by government changes this past spring.

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](#)).

UMW students remain in Virginia. As the Fact Pack demonstrates, in comparison with all public four-year institutions, UMW's instate graduates stay in the state at 3% higher rates, and UMW's out-of-state graduates stay in the state at 6% higher rates.

UMW's degree inventory includes five that are mapped to high-growth occupations:

- Computer and Information Sciences, General (11.0101)
- Business Administration and Management, General (52.0201)
- Registered Nursing/Registered Nurse (51.3801)
- Elementary Education and Teaching (13.1202)
- Education, General (13.0101)

We repeat our concern expressed in 2023 that thinking of UMW's contribution to high-growth occupations by looking only at degree programs and their CIP Codes does not offer a complete picture of the University's contribution to talent development in Virginia. For example, we do not have "Pre-medicine/Pre-Medical Studies" (51.1102) [or for that matter some of the other "Healthcare Diagnosing or Treating Practitioners" degree programs]. However, many of the students enrolled in our Biology degree program (and its fastest growing major, Biomedical Science) consider themselves pre-health, are advised as if they are pre-health, take all of the courses that a pre-health student would take, and ultimately go on to pursue careers in health sciences.

Going forward, and in consideration of regional needs, UMW is focused on supplying talent in key industries, including education, healthcare, business, computer-based-occupations, and new and emerging information technologies. This is especially so given our regional partners and relationships, which include area school districts, small and medium-sized technology companies, defense contractors, the federal lab at the Naval Surface Warfare Center Dahlgren Division (the second largest employer of UMW graduates) and Mary Washington Healthcare (the largest employer of UMW graduates).

One key aspect of our reorganization efforts has been to bring together the departments and programs to align with these needs. For example, the departments of business, computer science, economics, and mathematics into one college. The knowledge, skills, and competencies of these programs – as well as the opportunities for graduates – are enhanced when they work together. Similarly, to support the growth of programs in education and health care, which both have significant clinical components and accreditation needs, we have created a college that can support these efforts and which has room to grow.

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

UMW has a number of strategies and actions to better align program offerings or degree conferrals to current and projected workforce needs.

First, we have elevated career and workforce under an associate provost whose portfolio includes career and professional development, continuing and professional studies (non-credit learning opportunities for the region), and work-based learning through V-TOP initiatives to support the growth of internships in the region, and our Quality Enhancement Plan which makes career readiness a primary component of the entire student experience.

Second, our institution-wide focus on career readiness, the connection between academic programs and career opportunities through for-credit courses, and career counseling and advising will further support this effort.

Third, UMW has launched a program to supplement student degree programs and meet the workforce needs of the region with in demand industry credentials. This means that in addition to a bachelor's degree, we encourage students to pursue industry credentials and include those as part of key degree programs.

Fourth, we are adapting and innovating within existing degree programs to create programs of study that meet the expectations of employers within high-growth fields.

In the College of Business, for example, a number of efforts have been launched including new speed-networking events with regional employers, pitch competitions involving new curricular offerings in entrepreneurship, the creation of a design thinking lab, pursuit of NSA CAE-CR Accreditation, the establishment of the Next Gen Partnership with the Chamber of Commerce, expansion of the Eagle Works business incubation operation, the revival of StartUp UMW and the Small Business Development Center (SBDC).

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

UMW has focused on affordability and has worked to keep tuition increases low. With a modest endowment, UMW relies heavily on state, federal, and institutional aid to meet the needs of students. UMW has intentionally tried to serve more students with financial need, but the institutional cost of doing so has hit a tipping point. To improve affordability, UMW has relied on cost cuts with a significant (20%) reduction in both full-time and part-time employees over the last six years (from 1066 to 845). Flattening the organizational structure of the institution has been a priority, significantly reducing the number of mid-level administrators. Looking at student borrowing data on UMW’s Fact Pack you can see a recent trend of leveling off on annual borrowing with a decrease in net price in 2023-24. The data also shows that the percentage of students borrowing has declined in recent years. Collaborating with other schools through the creation of degree pathways has been and will continue to be an important strategy to make higher education affordable for UMW students. As stated in other parts of this plan, UMW continually assesses its budget and academic programs for opportunities for reallocation to highest and best priorities, which is supported by the specific examples of reductions in staffing and the ongoing assessment and changes to degree offerings.

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](#)).

- **Rationale:** UMW seeks to keep costs low while maintaining a balanced budget amid uncertainty about state support and enrollment. Our published tuition and fees reflect that philosophy as evidenced by the fact that in-state undergraduate tuition only increased 1.1% on average since FY 2019. UMW's financial aid award strategy is designed to enroll enough students to generate the revenue necessary for a balanced budget while also balancing the imperatives of providing access, ensuring completion, and providing a high-quality education that realizes positive outcomes for students.
- **Feasibility:** UMW's assessment of tuition and fee increase feasibility is informed by several factors. (1) We consider support from the state, especially as it relates to a variety of inflationary cost increases, state-mandated increases in salaries and health insurance premiums, minimum wage increases, and increased costs for administrative systems in areas such as finance, human resources, and information technology. (2) We consider whether we can keep costs low through means other than increased tuition and fees. (3) We consider our price point relative to others, especially tuition and fees for in-state students relative to Virginia's 14 other public institutions. For example, in 2024-2025, our in-state tuition and all mandatory fees was \$14,905 (ranked eighth among 15 institutions). (4) We also consider a host of other external factors, including public sentiment, political perception, and the economy.
- **Aid Awards.** UMW has partnered with an enrollment management firm to inform our financial aid award strategy for the past decade. This annual exercise considers historic data and budgetary projections to establish metrics and goals for the year for various subpopulations. Factors considered include: our goals for providing affordable access, likely yield rates, market factors, academic profile, a student's ability to pay, and a student's willingness to pay. This analysis then informs UMW's strategies for awarding both merit aid and need-based aid and serves as the foundation for enrollment goals as well as our net tuition revenue and discount rate goals. In 2024-25 we changed partners because we were not satisfied with a continued increase in discounting. We project steady declines and a reversal of the discounting trend observed over the last decade.
- **Institutional financial aid and unfunded state mandates.** An important driver underlying our response in this section involves both institutional financial aid and the state mandated Virginia Military Survivors and Dependents Education Program

(VMSDEP). The changing enrollment landscape has led to increases in institutional aid to meet enrollment targets at a price point that students are willing to pay. As UMW's infrastructure ages, their willingness to pay goes down and we have increased aid in response. These costs had increased by 492% or \$7.5 million over 10 years. At the same time, and until last year, we've had to incorporate the financial implications of VMSDEP – a valued program – with no additional support. We are grateful for increased state support to address this challenge, and you will see a continued focus on fully funding this program in UMW's general fund requests. The over \$1.7M received in FY25 is welcome support, but the total cost of the program to UMW in FY25 is almost \$3M. FY26 support, if at FY25 base levels will be over \$1.5M, with another \$400k dependent upon state revenues according to the state budget. If the program continues to increase at historical levels, total cost to UMW in FY26 is possible to be double the state support, even including the revenue dependent additional funding.

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

In 2023 we reported in this space that the discounting strategy employed since 2014 was “unsustainable.” We are happy to report that this has changed. If projections for the fall 2025 cohort remain, we will have stabilized enrollment of new students at approximately 1000, while decreasing the acceptance rate by nearly 10% and reducing our institutional aid spend by approximately 5%. We have taken a number of steps to reverse the discounting trend including working with a new partner that has brought fresh perspective, reducing top dollar awards, and providing awards to all students. Looking ahead, we anticipate further reductions in institutional aid spending through the elimination of other automatic awards, shifting some scholarships to private funds because of endowment growth, and continued optimization of our financial aid awarding strategies.

COST EFFECTIVENESS

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

D4. Reflect on the categories/subcategories of cost that have recently experienced the most significant increases on an absolute or per-student basis. What have been the primary drivers of those increases? Please be specific and include supporting data using the “Expenditures by Category” and “Financial Health” slides from your institution’s fact pack data ([linked here](#)).

HEPI and CPI over the 10-year period show total growth of 33 and 31 percent respectively. Total growth in E&G and Auxiliary at UMW is at 35%, slightly higher than inflation. In dollar terms, UMW in FY24 was at \$134M total versus \$130-\$132M if adjusting FY14 for inflation. Expenditures per student FTE show a higher growth trend related to some shifts in enrollment. UMW has responded to lower overall enrollment levels starting around Fall 2019 by intentionally eliminating positions, offering early retirement options for faculty, and assessing overall services to ensure we are providing the best experience for our students at sustainable staffing levels. All institutions, regardless of size, require a baseline level of staffing to manage the overall operation.

E&G and auxiliary increases have been driven largely by salary and fringe, VMSDEP, utilities and other contract increases. Auxiliary enterprises in FY24 had a larger increase related to UMW taking advantage of state debt refinancing during COVID which meant we did not have principal payments in FY22 and FY23. Those payments returned in FY24. In addition, during the same time of the debt refinancing in FY21 the university took on additional debt related to the acquisition of Eagle Landing housing. The debt service for this student housing is covered by the revenues that UMW now generates from student rent. As discussed in the institutional strategy section, a focus on modernizing campus infrastructure is essential to student recruitment efforts and to get UMW ahead of the cost curve related to deferred maintenance. We have made targeted investments in smaller, non-capital projects over the past few years to address these needs without taking on further debt.

For institutional/admin expenses, increases have been driven by similar factors and some related specifically to this category. When looking at total expenditures, again salary and fringe benefit increases account for over \$2 million of the increase since FY20 with the state budget including 22% salary increases (20% for faculty) and 7.3% total health insurance rate increases. In addition, UMW has invested in student recruitment and marketing over this timeframe along with increases related to information technology infrastructure that supports the entire operation. UMW has also invested in campus health and safety with an increase of over \$500k, 31%, in the ten-year period.

Another underlying cause of cost increases that is relatively unique to UMW is due to our geographic location. The Fredericksburg region has experienced a significant cost of living increase over the last decade. Fredericksburg and the surrounding counties of Stafford and Spotsylvania are considered part of the Washington-Arlington-Alexandria Metropolitan Statistical Areas (MSA) as determined by the U.S. Office of Management and Budget (OMB). We have to consider appropriate competitive salary levels to attract talent when competing in a high-cost marketplace in the Northern Virginia/DC Metropolitan area.

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](#)).

UMW is focused on maximizing the value of our student’s educational experience through a rigorous annual assessment of existing resources, assessment of opportunities to generate additional revenue consistent with the university’s mission, and continued focus on our relationships with valued alumni and donors who support UMW. As part of that annual assessment, UMW has implemented significant headcount reductions to respond to enrollment trends including the implementation of a faculty early retirement incentive program in 22-23 with eight faculty choosing to participate that ultimately leads to a \$1.1M permanent cost reduction. One way to display this considered approach is to look at salary and health insurance costs at UMW in FY14 and inflate those by the salary and health increases included in the state budget to get a representation of what the FY24 cost would have been just escalating by state increases. Actual expenses for salaries and health insurance for full-time employees are almost \$8M lower in FY24 than inflated FY14 salary and health levels. The expected impact related to this targeted work to reduce staffing levels is to maximize available resources and the timeframe is ongoing as this is a continual assessment.

UMW has also assessed net tuition revenue and the need to adjust institutional financial aid. Working with a new third-party partner we’ve made changes to our awarding strategy to better contain these expenses while still maintaining current levels of enrollment. Early indications are that this work will begin to pay dividends with the incoming Fall 2025 class. We will have a better idea of the impact once we get through multiple years to assess incoming class makeups and student retention.

Another approach that UMW is taking to improve fiscal health and student outcomes is modernizing campus infrastructure. There has been a concerted effort over the past few years to invest in smaller projects utilizing maintenance reserve funding, university reserves for auxiliary buildings, and other state capital funding in order to address deferred maintenance and campus accessibility. UMW is also thankful for the state’s support of a new Theatre and renovation to fine and performing arts buildings on campus. This strategy includes focusing on projects to produce energy efficiency such as LED lighting that requires some up-front investment, but pays that back over time through lower utility expenses. This ongoing initiative has shorter term goals to accomplish smaller projects annually to a rotating series of residence halls as well as utilizing facility condition data to focus our investments of maintenance reserve dollars. Longer term, UMW is in the process of prioritizing its next significant capital renovation request to the state focusing in on Simpson Library, a facility that both has a major need for renovation or replacement and can provide the most benefit to how today’s students learn. Our general fund requests include funding for a feasibility study for this facility, which will provide the necessary design framework to understand the costs and inform a full capital project request in future years. UMW’s efforts in this sphere would benefit from more streamlined state processes related to construction projects. The number of approvals, and the time that it takes to get them, can significantly impact project timelines and ultimately lead to cost escalations.

Referring specifically to the “Fastest Growing Expenditures” section of the Fact Pack, the largest annual growth rate percentage is in mental health counseling and career guidance. The need for personnel and investment in this area has grown greatly over the past decade. This is still a relatively small dollar amount compared to other categories so incremental investments push the percentage higher. When looking at administrative spend, it is also no surprise to see that IT related expenses have driven a large amount of the non-personnel increase. Investment in IT systems is necessary to provide a high-quality education and generate administrative efficiencies. While the growth rate for administrative personnel expense is not as high in most categories, it makes up such a large portion of the overall expense that smaller percent changes in salaries and benefits drive significant dollar increases year over year.

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.

The answer to this question has largely been addressed in the prior two sections, D4 and D5, which also reference Fact Pack expenditure data. To reiterate some of the challenges and UMW’s actions in response to them that are highlighted by the data in these sections:

- Enrollment decline- UMW has invested in marketing and has intentionally right-sized its incoming class. Enrollment has largely stabilized over the past few years. As already discussed, UMW has taken actions to decrease the size of its workforce to levels appropriate for the size of the student body. While number of employees per student FTE has a slight increase, this is related to the decrease in enrollment. Staffing changes take time to implement and some central departments must maintain a base level of employee FTE to manage university and state processes. The faculty retirement program started in 22-23, which is the last year shown on the fact pack data. Salary outlay per FTE increased by a larger amount than number of employees, which is to be expected given the level of salary increases included in the state budget since FY20 along with the regional market pressures previously mentioned.
- Investments in recruitment, marketing, and technology- Higher education admissions is an increasingly competitive environment. In order to ensure a stable incoming class and rebound from pandemic era impacted enrollment, UMW invested in recruitment marketing which is part of our administrative expense increase. Educating in today’s marketplace also requires investments in information technology infrastructure. This investment also helps create administrative efficiencies that are vital to an institution with a smaller workforce.
- Auxiliary Enterprises- As described above, a significant portion of the growth in recent years is really related to UMW taking advantage of state debt refinancing and not paying principal in FY22 and FY23. Those payments returned in FY24. We also acquired the Eagle Landing residence hall, which does come with debt service payments, but also generates revenue from student payments that offsets those payments. As described elsewhere, UMW has focused on smaller renovations in recent years that are designed to extend the useful life of our auxiliary facilities and increase their overall efficiency.

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.

While state supported salary increases are certainly welcome to assist UMW in keeping employee salaries closer to competitive market levels, the non-general fund share is not insignificant for those employees supported by tuition revenue, and the university has to fully cover the increases for auxiliary employees. Every 1% across the board tuition increase (graduate and undergraduate) generates around \$375,000. Given the GF/NGF split provided for the 2% salary increase, a 1% tuition increase would be needed to cover UMW's share of the E&G increases. Health insurance rate increases at 1% equate to just over 0.1% increase to tuition to cover the UMW share. In FY26, with health insurance rate increases at 6%, this was a more significant cost driver in the university's budget. On the auxiliary side, every 1% in salary and health insurance rates equates to a 0.56% comprehensive fee increase. So, given the 2% salary and 1% health insurance increase assumptions in the six-year plan, if UMW increased student costs to cover its share this would be a 1.1% increase to tuition and around a 1.1% increase to mandatory fees. As previously pointed out, UMW does not automatically increase tuition to support all mandatory cost increases, but assesses all cost increases against available resources and determines what, if any, tuition increase should be recommended. Having to use tuition and fee resources to offset across the board salary and fringe adjustments decreases UMW's ability to more strategically target its resources towards university priorities. In most years the combination of strategic priorities, salary and fringe adjustments and other unavoidable cost drivers like contract and utility increases requires a combination of tuition and fee adjustments and internal reallocation to balance the budget. UMW has done the work to reallocate resources and reduce employee headcount over the past decade. While UMW will continue to assess its available resources, the magnitude of possible reductions will be increasingly difficult to identify. We have a tight, but appropriate budget, without significant waste or fluff.

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.

As stated in many of the previous questions in this section, UMW has steadied its overall enrollment and has adjusted its resources appropriately to serve the existing number of students. We are continually assessing ways to control costs, opportunities to generate new revenue, and ways to offer academic programming that further bolsters the future enrollment picture. The pro forma tab highlights the one-time general funds that were included in the current biennial budget to support ongoing needs. Just over \$1.1M was for affordability to offset the need to increase tuition and UMW used it in that manner to help offset the nongeneral fund share of salary and health actions, and \$234,000 supported in-state undergraduate financial aid. In addition, the \$740k to support development of a MS in Nursing is supporting ongoing staffing costs. Those two items are UMW's top general fund requests. Should the funding not continue, UMW, along with other VA institutions, would have to factor in the need to cover already existing FY26 needs during the FY27 budget cycle and longer-range planning. UMW will need to assess tuition changes along with slowing down investments in program growth and further areas where we may be able to realize efficiencies.

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

See attachment in Appendix A.

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.

At the University of Mary Washington, our [Campus Free Speech](#) website lists our policies on free expression, describes how to file a complaint about a possible violation of free speech, and provides our Constitutionally-Protected Speech Annual Report and compliance certification to the governor's office. In addition, the state's Civility in the Workplace [policy](#) is listed on our Human Resources "Civility in the Workplace" [website](#).

Since 2023, UMW has participated in a collaboration between SCHEV and the Constructive Dialogue Institute that provides online modules to equip students to discuss complex and divisive topics, civilly. At UMW, all incoming new students complete the modules and participate in interactive sessions that reflect on the material and are led by faculty and returning students.

Also during New Student Orientation, every student is introduced to our institutional [ASPIRE](#) community values, which include "Respect and Civility: we foster an environment in which every individual is treated with dignity at all times by valuing the inherent worth of all identities, abilities, and differences."

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.

Medical/Health Sciences School – As reported in this space in 2023, UMW planned to conduct a feasibility study designed to better understand how it could help address the region's healthcare needs. That work is complete and UMW is moving forward along several fronts including having conversations with Mary Washington Healthcare about a partnership to deliver medical education.

[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?

Enhancing our partnership with the Naval Surface Warfare Center Dahlgren Division (NSWCDD) -- the largest federal lab in Virginia with approximately 10,000 employees and is a top employer of UMW graduates -- remains an important priority in the coming years, however there is less certainty about what that looks like since we established this goal in 2023.

To this point, NSWCDD has continued investing in and convening middle, high school, college and regional innovation challenges (a multi-day competition among schools in areas such as robotics, AI and machine learning). They also continue supporting a maker space in UMW's College of Education, partnered on K-12 education initiatives and have provided financial support for undergraduate STEM research, summer internships and faculty research projects. Previously, UMW served as the primary summer residential space for the nearly 200 students from around the country who come to NSWCDD each summer for internships. Those opportunities were scarce this summer.

Looking ahead, we still anticipate opportunities for UMW's campus to serve as a regional technology and innovation center in support of IP dissemination and commercialization. UMW aims to continue working with NSWCDD on the "Tech Bridge," a connected network that enhances collaboration between a Naval lab and the surrounding region in support of technology transition, transfer, and commercialization. UMW's Dahlgren campus still has the potential to grow to become a place where state and local governments, industry partners, technology accelerators, entrepreneurs and faculty researchers come together to enhance regional quality of life, advance state-of-the-art emerging technologies, and to stimulate economic growth across the region. UMW has entered into a Partnership Intermediary Agreement (PIA) with NSWCDD.

[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?

While previously listed in the six-year plan as a priority, the Lab School (the Academy of Technology and Innovation at UMW) is officially launched and has been moved to this section. The school launched in August 2024 and the second class will enter in fall 2025. Overall, this collaboration has brought together school districts from Caroline, Fredericksburg, King George, Orange, and Stafford County. UMW has committed a building (the south building of the Stafford campus to the school) and continues to support governance and operations.

UMW has existing collaborations with institutions around the Commonwealth. These primarily consist of developed pathways from (1) community college partners to UMW and (2) UMW Bachelor's degrees to graduate schools. Relationships currently exist with GMU (law, engineering), VT (engineering), and W&M (accounting and business analytics). We see opportunity for further expansion and development in this area, especially in STEM fields where UMW students have rich research opportunities that have prepared them well for graduate study

Other collaborations include the Smithsonian School of Conservation (at which UMW students take GMU courses and spend a semester at the Front Royal, Virginia, facility). Another is the Army ROTC program through which UMW students can participate in ROTC through coursework and training offered at UMW by GMU. There remains some interest in charting pathways from UMW Bachelor's degrees to accelerated GMU Master's degrees (e.g. Geography, since UMW has closed its MSGA program).

In addition, the College of Education continues to develop and refine partnerships with K-12 districts in the region, including working to address teacher shortages through courses and coursework to secure licensure, especially for career switchers who seek to bring their knowledge and skills honed over many years in a non-teaching career to an area classroom. They have also developed pathways for future teachers through Teachers for Tomorrow programs and worked to support teacher retention efforts through mentorship programs.

[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.

- 1) **Capital and maintenance.** We are grateful for the infusion of critical life safety funding. It has made a difference. Even so, this remains one of our most significant challenges: capital and maintenance projects which have long time horizons, undermine recruitment efforts, and delay the growth of programs. As an institution with limited liquidity to self-finance we have limited capacity to control such projects and ensure that they are completed well in a timely fashion.

One example involves the theatre and fine arts project which was identified as a key capital project as early as 2010. At present, the earliest anticipated completion is (ambitiously) 2028. An earlier example involved our underground utility project which tore up the same sections of campus for three years in a row and led to more than \$4 million in cost overruns.

Although we understand there are many complexities and compelling reasons for existing policies surrounding capital and maintenance projects, our experiences in other states suggest that such projects in Virginia often take longer and come in at higher costs and lower quality. The number of processes and various state agencies and committees involved offer multiple places for projects to get hung up awaiting responses, cooperation between agencies, etc.

- 2) **VMSDEP.** From a state policy standpoint, funding or reimbursing institutions for tuition and fee waivers incurred under the Virginia Military Survivors and Dependent Education Program (VMSDEP) would make a significant impact to the University of Mary Washington's fiscal operations. UMW has experienced an almost \$2.5 million increase in annual VMSDEP waivers growing from \$560K in FY20 to almost \$3M in FY25, which is an annual average growth rate in excess of 45%. Based on projections from SCHEV and analysis performed by other Commonwealth institutions, the program is projected to continue to grow in usage. The VMSDEP waivers have a significant negative impact on fiscal operations in the form of lost revenue on the academic services provided to program participants. UMW supports Virginia's commitment to veterans and asks that the state fully fund this benefit program.

[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.

As we look forward, it is also important to look back at UMW's progress since the 2023 six-year planning process. In that plan, UMW set a vision for how it could serve the Commonwealth while addressing some of its enrollment and financial challenges. Two years later, UMW finds itself in a much stronger position.

Reformed UMW Foundation

The UMW Foundation has undergone a strategic restructuring focused on transparency. It liquidated its real estate holdings, paid off its debt, reduced annual operating costs by \$1.4 million, selected a new Outsourced Chief Investment Officer, reduced the size of the board, changed leadership, and benefited from three consecutive years of record fundraising to now manage an endowment that exceeds \$100 million. As a result of these changes and the hard work of the new Foundation board and staff, the UMW Foundation is fulfilling its mission to provide private financial support to students, faculty, and UMW operations without putting a strain on UMW's operations.

Academic Reorganization

UMW has undergone an academic reorganization to better facilitate curricular innovation, administrative efficiency, and resource allocation to better support new and growing programs.

Institutional Aid

UMW's 2023 Fact Pack revealed the challenge of rising institutional aid and declining net tuition and fee revenue. UMW took direct action to reverse this trend amid the challenges of a very competitive market. UMW hired a new financial aid optimization firm, Sightline, to assess and better control institutional financial aid, and with the help of increased state support and a more judicious approach to merit awards, the new approach has helped UMW turn things around.

The new financial aid allocation model is expected to net \$800,000 to \$2.5 million in additional tuition and fee revenue for the incoming class (fall 2025). UMW is projecting over \$1,000 of additional per student tuition and fee revenue; \$459 due to board-approved tuition and fee increases, and \$582 due to a revamped institutional aid allocation.

Stabilized Enrollment

UMW has been able to reduce its institutional aid spend while increasing its selectivity, retention rate, and overall enrollment. This past year's acceptance rate dropped to 73.9% compared to the previous three-year average of 83.9%. In addition, last year's retention rate hit 84.4%, and enrollment is expected to inch closer to UMW's enrollment target of 4,000 students.

UMW's Finances

New state investments, containing costs, and eliminating UMW Foundation debt have helped UMW enjoy year-end cash balances and build reserves. These reserves have been used to address a myriad of deferred maintenance and health and safety projects on campus.

A Focus on Regional Economic Development

Getting its financial house in order has allowed UMW to focus on regional economic development. UMW continues to sponsor the Fredericksburg Regional Alliance that brings together the City of Fredericksburg with four surrounding counties to work together on the economic development of a rapidly growing region.

As the only university serving this region, it is important for UMW to meet all the educational needs of a diverse and growing population. This includes, in part, graduate education that serves the U.S. Naval Surface Warfare Center Dahlgren Division in King George County, the new Academy of Technology and Innovation in Stafford County, a Veterans Resource Center and full-time Military Affiliated Student Support Specialist to serve the region's large Veteran population, medical education to help meet the region's acute healthcare needs, and offering creative and adaptable programs for adult learners who need to develop new skills to succeed in a rapidly changing economy.

In conclusion, UMW has made significant progress over the last two years, and the Commonwealth's continued investment in its future has played a big role in this turnaround. UMW has been a good steward of these resources and is working hard to meet the educational and workforce needs of the region and Commonwealth. Now is the time to think big about both UMW and the Fredericksburg region's future.

Appendix A: Contributions to Economic Development



2025 Report on Economic Contributions to the Commonwealth

A study for the Virginia Business Higher Education Council using FY2021 data estimated that UMW's total economic contribution was nearly \$1 billion dollars with state tax revenue exceeding \$60 million. Within the University, there are four areas that are actively contributing to economic growth and development: **Dahlgren Campus, Continuing and Professional Studies, Center for Economic Development (CED), and Small Business Development Center (SBDC)**

Dahlgren Campus

The UMW Dahlgren Campus has become a catalyst for economic growth and resilience in the Northern Neck, Middle Peninsula, and Fredericksburg region. Over the past year, several new initiatives have strengthened its impact:

- **Workforce Development:** Expanded cohort programs with the Potomac Tech Bridge, tailored micro-credentials, and professional workshops for veterans help fill regional talent gaps in STEM and cybersecurity.
- **Community Engagement:** Hosting events like the Adaptable Interface Innovation Challenge and the Collegiate Cyber Challenge has boosted regional collaboration and underscored UMW's economic impact.
- **Regional R&D Hub:** Investments in lab facilities and partnerships with defense contractors have made UMW Dahlgren a center for research and innovation, driving job creation and competitiveness.
- **Interdisciplinary Collaboration:** The Cross-Disciplinary Innovation Network (CDIN) has grown, uniting public- and private-sector leaders to tackle cybersecurity, data analytics, and advanced manufacturing challenges.
- **GO Virginia Alignment:** Strategic initiatives have secured GO Virginia grant funding, strengthening workforce pipelines and meeting industry needs in defense and cybersecurity.
- **Veteran Integration:** Veteran-focused cohorts and leadership programs enhance workforce diversity and regional innovation capacity.
- **Entrepreneurial Ecosystem:** Through mentorship, startup support, and incubator access, local entrepreneurs have turned prototypes into market-ready products, fueling the regional economy.

- **Defense Collaboration:** Enhanced partnerships with NSWCCD have deepened UMW's role as a hub for defense and cybersecurity innovation, offering students internships and aligning with national defense priorities.

Together, these efforts affirm UMW Dahlgren's leadership in building a resilient, innovation-driven regional economy.

Continuing and Professional Studies

Continuing and Professional Studies supports economic development in the greater Fredericksburg region by creating professional development, skill-building, and networking opportunities that align with the strategic initiatives of our community and economic development leaders. In total, UMW Continuing and Professional Studies hosted nearly 60 programs, reaching an audience of over 1,500 participants. We regularly meet with employers, school divisions, and locality leadership to learn the needs of the community.

Through our process of co-creation, we've developed 11 community focused seminars and workshops to support professional development and upskilling needs of entrepreneurs and leaders in mid-sized and large organizations, eight opportunities for skills-focused personal enrichment, another 18 custom programs tailored specifically to school division staff and healthcare associates and leaders, and over 20 workshops, training opportunities, and courses to elevate the skills of new teachers and support teacher retention in our region.

Through our Business Acumen Series, we directly supported 35 small and mid-sized businesses as well as the regional healthcare system, and five school divisions in 2024, with multiple organizations attending multiple workshops over the year. In total, there were over 200 participants in the Business Acumen Series in 2024. Additionally, we work with local leadership to reduce the cost of these programs to the business community through scholarships and grants. By working closely with partners in the public, private, profit, and non-profit sectors, we are able to build learning momentum that contributes to the efficiency of the community.

Virginia Talent + Opportunity Partnership

The Virginia Talent + Opportunity Partnership - Rappahannock Work and Learn Collaborative (V-TOP - RWALC) is a regional coalition of local education, business, and economic development leaders convened by UMW through the SCHEV Regional Collaborative Grant, who work together to facilitate connections between employers and emerging talent for work-based learning opportunities throughout GO Virginia Region 6.

V-TOP - RWALC supports economic development in the region by facilitating employer eligibility for the V-TOP Matching Funds Program, which offers a 50% funding match for small businesses to hire paid interns. In fiscal year 2025, 37 employers in the region have qualified for the program, which has increased their capacity to create up to 8 internship positions in their organizations over the next two years. Overall, V-TOP - RWALC has directly contributed to facilitating employer eligibility for 86 employers across 6 Virginia regions between fiscal years 2024 - 2025.

Additionally, V-TOP - RWALC has contributed to promoting the essential role of work-based learning in economic development, especially paid internships, through public relations, panel discussions, and regional events for two statewide recognition initiatives—Virginia Intern Day and Top Virginia Employers for Interns. This year, V-TOP - RWALC is proud to recognize 12 local Top Virginia Employers for Interns honorees and 13 Virginia Intern Day Student Ambassadors representing all three of our postsecondary institutions. Both cohorts of honorees have tripled in size since these recognition initiatives began in 2023.

Through our regional efforts, V-TOP - RWALC contributes to advancing our statewide goal for all students of postsecondary institutions to have at least one paid internship by the time they graduate. Strides toward achieving this goal will support a thriving economy for Virginia by ensuring that students are workforce ready.

Center for Economic Development

The University of Mary Washington Center for Economic Development (CED) has inspired and enabled entrepreneurs and their organizations to pursue economic growth through education, consulting, connecting, and supportive research. CED offers high-impact programs designed to meet the needs of the community, students, faculty, and businesses.

As part of a strategic planning exercise in Academic Year 2024-2025, the CED – which is housed in the College of Business (COB) has been fully integrated into the mission and activities of the college and the curriculum. This included the hiring of two new-tenure track entrepreneurship faculty who serve as co-directors of the CED while also creating a new entrepreneurship curriculum that serves students and the community. These plans included a clearer focus for the CED around “Entrepreneurship and Innovation,” although many of the past programs were retained. The programs that were retained include: Eagle Works Business Incubator, Start Up UMW, and the Eagle Innovation Pitch Competition.

Eagle Works Business Incubation Center: The Eagle Works Business Incubation Center provides business development services to local startup and early-stage companies looking to grow their enterprises. Incubation programming supports entrepreneurs through access to professional networks, office facilities, consulting services, peer engagement, student intern access, faculty mentoring access, and other business resources. It is an immersion program that helps improve business productivity by working in a professional full-service office environment.

Clients can share ideas with other business owners in the incubator, meet with clients in the conference rooms, and take advantage of the professional networks associated with the center. They receive professional advice from business consultants, entrepreneur mentors, and attend training courses, workshops, and peer-to-peer roundtables. Eagle Works meets the unique start-up or growth needs of each business through flexible client plans. Fiscal year impacts include the following.

- 8 clients worked with student groups from Digital Marketing class to develop branding, social media strategies, and marketing plans in the Spring and Fall semesters in 2024.
- 5 students worked with Capstone Business Strategy class on business development strategies. Students assessed business operations, financial management, and the business environment. They developed three recommended actions for each client. SBDC will work with clients on recommended actions.
- 8 UMW students worked as interns with a long-time SBDC client, Banduri, on customer discovery for a new product in development. The product idea was first explored in an ICAP cohort in 2022. The team created a Value Proposition Canvas tailored to customer segments by age, ensuring their approach was deeply user-centered and market-aware. Their final project idea, titled Jade Rabbit, is now being prepared for market launch. UMW Business professor Chris Willis oversaw the internship. The students validated the business model, identified customer segment groups, and developed marketing strategies for different segments.

Start Up UMW: The UMW Center for Economic Development offers an interdisciplinary college student entrepreneur education program called Start Up UMW. This is a program that teaches student entrepreneurs the essential skills and effective strategies for starting and running a business. This program is designed to engage and inspire students who learn from successful business owners and local professionals, and UMW staff. Students gain valuable skills and knowledge customized to fit career goals through: (1) opportunities to learn from experienced, successful entrepreneurs and professionals; (2) greater understanding of what it means to be entrepreneurial; and (3) access to research databases, business consultants and office space to ideate and commercialize. Students gain valuable skills and knowledge customized to fit career goals through:

- opportunities to learn from experienced, successful entrepreneurs and professionals;
- greater understanding of what it means to be entrepreneurial;
- access to research databases, business consultants and office space to ideate and commercialize;
- tools to write a business plan which can be used to seek funding for a business venture;
- feedback and guidance from the UMW Center for Economic Development's team of advisors;
- opportunities to earn academic scholarship money and seed capital through Eagle Innovation; and,
- fulfillment of Experiential Learning, Internship Experience, or Independent Study.

Fiscal year impacts for Start Up UMW students include the following. With the hiring and start of two entrepreneurship professors in academic year 24-25, Start Up UMW has re-started with new programming under the leadership of the new professors. For Fall 2025, 7 students have applied to participate in Start Up UMW.

Eagle Innovation: Eagle Innovation is a one-day business pitch competition open to all UMW and Germanna Community College students. Students showcase their concepts to a panel of business professionals. The three top teams receive seed capital. Seed capital recipients are validated by having an established legal structure and a commercial bank account where they can receive funds. The event is a collaboration between the UMW Center for Economic Development and a team of student leaders from the College of Business.

- The Spring 2025 Eagle Innovation Pitch Competition resulted in 19 teams applying, 9 teams participating in the final competition, and \$4,500 in seed capital awarded to the top 3 participants.
- Two event sponsors donated \$500 each to support the competition: Christine Goodwin of Banduri and Andrew Blate of Beautiful Home Services.
- UMW alumni Andrew Blate '04, co-owner/founder of remodeling company Beautiful Home Services; Christine Goodwin '96, CEO of digital design firm Banduri; and Robby Noll '88, principal of Building Management Company Holdings Group, served as judges.

Small Business Development Center

Established in 1992, the University of Mary Washington Small Business Development Center (SBDC) is a resource center serving Planning Districts 16, 17 and 18. The SBDC provides assistance directly to the small business community via management education, industrial and demographic research, and confidential one-on-one consulting with a focus on capital access and management planning. A partnership with the US Small Business Administration and the Virginia Small Business Centers Network (hosted at George Mason University), the University of Mary Washington is able to affect economic prosperity and assist underserved markets throughout the GO Virginia region 6 Impacts in the contract year for UMWSBDC (contract calendar year 2024) include the following:

- 47 business clients were served
- 2 business clients were UMW students
- 2 business client was UMW faculty
- 2 business clients were UMW Alumni
- 45 new companies were launched
- 549 new jobs were created
- 1,858 jobs were retained
- \$6.13 million in new capital was invested in commercial pursuits
- 51 Management courses taught
- 1,184 Total attendees
- 96.4% Satisfaction rating

Innovation and Commercialization Assistance Program: The UMWSBDC is a partner with the Virginia Innovation and Commercialization Program (ICAP) and the Virginia Innovation Partnership Corporations (VIPC). This partnership combines efforts by the University of Mary Washington, George Mason University, and VIPC to grow a stronger ecosystem for technology

development and commercialization. ICAP is a program based on the National Science Foundation's I-Corps™ program for Lean Startups. ICAP helps inventors and innovation entrepreneurs take orderly first steps in bringing new technologies and innovations to market. The program includes training and counseling services offered through ICAP instructors and local SBDC advisors. ICAP helps startups identify potential customers and develop successful business models based on that knowledge. UMW provides an innovation Peer to Peer program to complement the accelerated commercialization track. Fiscal year impacts include the following: (1) 6 businesses clients were referred to ICAP, (2) 3 businesses participation in ICAP.

Government Contracting Assistance Center: The Government Contracting Assistance Center (GCAC) is a program of the Small Business Development Center and collaborates with the US Small Business Administration, the Procurement Technical Assistance Program (George Mason University), and the Virginia Department of Small Business and Supplier Diversity. This program also closely collaborates with the UMW procurement department to support the UMW SWAM goals. FastTRAC certifications produce value for both the external community and the contracting compliance for the University of Mary Washington. It facilitates one-on-one customized government contracting assistance consultations with advisors who can coach across a number of topics in both the Federal and Virginia contracting disciplines. The GCAC FastTRAC program prioritizes assistance for the preparation and attainment of valuable certifications that support contract fulfillment. These include registrations for Small-Woman-Minority Owned Business (SWAM) and the Federal System for Awards Management (SAM). Others include Historically Underutilized Business Zone certification, the 8(a) program, Small, Woman-Owned, Veteran-Owned, Service-Disabled Veteran, Small Disadvantaged, and other certifications. Fiscal year impacts follow.

- 28 State Contracting consultations
- 23 Federal Contracting consultations
- 38 System for Award Management registrations
- 56 SWaM certifications
- 50 eVA registrations
- 18 Woman Owned Small Business self-certifications
- 4 Service-Disabled Veteran Owned Small Business verifications
- 6 8(a) certifications
- 0 HUBZone certifications
- 4 Disadvantaged Business Enterprise Certifications
- 2 Fast Track applications

Regional Initiatives: The Small Business Development supported regional initiatives through the following activities:

- **Virginia Black Chamber of Commerce:** Provided letter of support for the Virginia Black Chamber of Commerce Business Accelerator grant application from GO Virginia Region 6. Served as mentor to 6 businesses that graduated from the program. UMW SBDC director serves as a member of the VBCC Business Accelerator program advisory board.
- **Rappahannock Tribe.** Provided technical assistance to tribe in applying for 8a certification, which was awarded in October 2024. Provide research and guidance as tribe works on a

plan to develop a 1,000-acre property in Richmond County and on how to benefit from 8a certification.

- **Rural Support.** Participated in Northern Neck Technology Group meetings and Bay Consortium Business Services meetings, including serving on the RAFT (Resilience Adaptation Feasibility Tool) subgroup on Economic Development and Living Wages committee. Provided in-person consultations in the Northern Neck and Middle Peninsula in response to clients' needs.
- **Support of Women Entrepreneurs.** UMW SBDC spoke to the following groups:
 - Caroline County Women Business Owners on SBA resources and SBDC assistance.
 - UMW Colloquium Coffee Chat—topic “Empowering Women through Business Ownership”
 - UMW College of Business Women in Business Conference—topic “The Transition from College Student to Business Owner.
- **Support of Veteran Entrepreneurs.** Co-hosted Veteran Business Bootcamp with Stafford County EDA attended by 35 veterans. Presented UMW CED Veteran Business Owner of the Year award.
- **Rappahannock Work and Learn Collaborative.** Member of advisory board. UMW SBDC hosts quarterly in-person meetings of board.