



AGENDA

JOINT ANNUAL MEETING

IALR BOARD OF TRUSTEES (BOT) & IALR FOUNDATION BOARD OF DIRECTORS (FBOD)

Conference Room 207

Thursday, May 16, 2024 - 9:00 a.m. – 12:00 p.m.

I. Convening of Open Session

- | | |
|---|----------------------------|
| A. Call to Order of Board of Trustees | Don Merricks |
| B. Call to Order of Foundation Board of Directors | Lott Rogers |
| C. Welcome | Don Merricks & Lott Rogers |

II. Attendance of Committee Members by Electronic Communication Means (Vote Required)

Don Merricks & Lott Rogers

III. Meet the Department

Telly Tucker

IV. Approval of Minutes (Votes Required)

BOT

- | | |
|--|--------------|
| A. Approval of February 15, 2024, Minutes – Joint BOT & FBOD Meeting | Don Merricks |
|--|--------------|

FBOD

- | | |
|--|-------------|
| A. Approval of February 15, 2024, Minutes - Joint BOT & FBOD Meeting | Lott Rogers |
| B. Approval of April 29, 2024, FBOD Nominating Committee Meeting Minutes | |

V. Public Comment to IALR Board

Don Merricks

VI. Closed Session – Foundation Board of Directors

Don Merricks

VII. Committee Reports and Actions

A. Resources

Charles Majors/Angie Anderson

➤ IALR Report – FY2024 – 3rd Quarter Update

Telly Tucker/Angie Anderson

- Approval of FY2024 – 3rd Quarter Update (Vote Required)

➤ Foundation Report – FY2024 – 3rd Quarter Update

Lott Rogers/Angie Anderson

- Approval of FY2024 – 3rd Quarter Update (Vote Required)

- **Budget FY25 - IALR Budget Comparison – FY24 vs FY25
(Vote Required)** Telly Tucker/Angie Anderson
- **Proposed Manufacturing Advancement Division Budget
(Vote Required)** Telly Tucker/Angie Anderson
- **Conflict of Interest Policy (Signatures Required)** Angie Anderson
- B. The Institute Conference Center & Facilities (10 Minutes)** Tracy Fink
- C. Manufacturing Advancement (10 Minutes)** Ben Davenport/Amanda Hylton

RECESS / BREAK

- D. Applied Research (10 Minutes)** Telly Tucker / Scott Lowman
- E. Economic Development (SVRA) (10 Minutes)** Linda Green
- F. Programs & Services (10 Minutes)** Greg Hodges/ Julie Brown
- VIII. Nominating Committees**
 - A. BOT Appointments **(Vote Required)** Betty Jo Foster
 - B. BOT Slate of Officers **(Vote Required)** Betty Jo Foster
 - C. Appointments from BOT to FBOD Don Merricks
 - D. Introduction of FBOD Officers Lott Rogers
- IX. Leadership Reports**
 - A. BOT Chair's Report Don Merricks
 - B. FBOD President's Report Lott Rogers
 - C. IALR President's Report Telly Tucker
 - D. Comments from the New BOT Chairman Newly Elected
- X. New Business and Open Forum of
Rogers
Concerns/Issues/Observations for BOT & FBOD** Don Merricks/Lott
- XI. Closed Session – Board of Trustees** Don Merricks
- XII. Adjournment of BOT & FBOD** Don Merricks
Lott Rogers

PLEASE REMEMBER THIS MEETING WILL BE HELD IN-PERSON.

ZOOM INSTRUCTIONS WILL BE PROVIDED FOR TRUSTEES AND DIRECTORS UNABLE TO ATTEND IN-PERSON.

FY2025 Proposed Meeting Schedule

BOT Committee Meetings:

<u>July 30, 2024</u>	<u>October 29, 2024</u>	<u>January 28, 2025</u>	<u>April 29, 2025</u>
	9:00 am - 10:30 am	Applied Research	
	10:45 am - 12:00 noon	Resources	
<u>August 1, 2024</u>	<u>October 31, 2024</u>	<u>January 30, 2025</u>	<u>May 1, 2025</u>
9:00 am - 10:30 am		Programs & Services	
10:45 am - 12:00 noon		Manufacturing Advancement	

Board Meetings:

August 15, 2024	9:00 am – 12:00 pm
November 14, 2024	9:00 am – 12:00 pm
February 13, 2025	9:00 am – 12:00 pm
May 15, 2025	9:00 am – 12:00 pm



BOARD OF TRUSTEES (BOT)

Minutes – February 15, 2024

<u>Board of Trustees Present</u> Mr. Ben Davenport Dr. Betty Jo Foster Dr. Tiffany Franks Dr. Guru Ghosh Mr. Don Gibson Dr. Greg Hodges Mr. Mark Holland Ms. Emma Kozlowski, <i>via Zoom</i> Ms. Leslie Mantiply Mr. Don Merricks, <i>Chair*</i> Mr. Kunal Patel Mr. Lott Rogers <u>Board of Trustees Unable to attend</u> Mr. David Bennett Mr. Charles Majors Dr. Jerry Wallace	<u>IALR Leadership & Officers Present</u> Ms. Angie Anderson, Chief Financial Officer Dr. Julie Brown, VP of Advanced Learning Ms. Linda Green, VP of Economic Development (SVRA) Dr. John Hughes, EVP of Operations Ms. Amanda Hylton, VP of Strategic Initiatives, MA Dr. Scott Lowman, VP of Applied Research Ms. Allison Moore, Director, PR & Communications Ms. Pam Patterson, Secretary, BOT & FBOD Mr. Telly Tucker, President, IALR <u>IALR Leadership & Officers Unable to Attend</u> Ms. LaShaun Graham, VP of Human Resources <u>Additional Staff</u> Mr. Caleb Ayers, Communications Content Manager Ms. Ellen Bass, Manager of Sales & Marketing (ICC) Mr. Daniel Dalton, Graphic & Multi-Media Specialist Ms. Natori Neal, Apprenticeship Program Coordinator Ms. Diana Parrish, Event Planner & Service Operations Coordinator (ICC) Dr. Cassandra Shelton-Bowman, REACH Program Man. <u>Guests</u> None
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Convening of Open Session

The IALR Board of Trustees (BOT) meeting was held on Thursday, February 15, 2024. An attendance roster is included as (Exhibit A). Mr. Don Merricks, Chair, called the meeting to order at 9:00 a.m. A quorum was present.

Attendance of Committee Members by Electronic Communication Means

Mr. Don Merricks announced that Ms. Emma Kozlowski would attend the meeting via Zoom. Ms. Kozlowski attended from her home due to her distance of travel. The BOT voted to allow Ms. Kozlowski to attend via Zoom.

- **Motion:** Dr. Greg Hodges made a motion to allow Ms. Emma Kozlowski to attend the BOT meeting via Zoom. Mr. Ben Davenport seconded the motion. The motion passed unanimously.

The results of the vote are shown below:

Board of Trustee Members Absent	-	3
Board of Trustees Votes For	-	11
Board of Trustees Votes Against	-	0
Board of Trustees Abstentions	-	0

Recognitions

Dr. John Hughes conveyed his gratitude to Ms. Ellen Bass, Ms. Diana Parrish, Ms. Theresa Lewis, and Ms. Simone Henderson for their exceptional contributions to the Institute Conference Center (ICC). He commended their dedication and willingness to exceed expectations in their service.

Dr. Hughes extended congratulations to Mr. Daniel Dalton and Mr. Caleb Ayers for their recent awards from the Public Relations Society of America Blue Ridge Chapter. They were honored with two Gold Summit Awards in Publications and Annual Reports for the combined 2021-2022 report as well as a Silver Award for writing.

Dr. Julie Brown extended her congratulations to Dr. Cassandra Shelton-Bowman for the achievement of the REACH Partnership, which was honored as the 2023 Health Quality Innovator of the Year. The Regional Engagement to Advance Community Health (REACH) Partnership secured the distinction in the Rural Health category for its effective strategies in addressing systemic socio-economic and generational health challenges. The Health Quality Innovation network operates in 27 states.

Dr. Julie Brown congratulated Ms. Natori Neal, Apprenticeship Coordinator II, for receiving the Outstanding Apprenticeship Intermediary Silver Award from the Virginia Department of Workforce Development and Advancement (Virginia Works). This year was the first year that the agency presented awards to recognize intermediaries. IALR was one of two award recipients. The IALR supports the creation and implementation of apprenticeship programs for employers across Southern Virginia through the Expanding Talent through Registered Apprenticeship (ExTRA) program. From 2022 to the present, ExTRA helped register 36 apprentices into 18 apprenticeship programs.

Meet the Department

The following staff members were introduced.

Ms. Amy Davis	-	Procurement Specialist
Mr. David Gauldin	-	ATDM Metrology Instructor
Ms. Simone Henderson	-	Part-Time Customer Service Specialist
Mr. Brandon Holder	-	Manager, Digital Manufacturing
Mr. Trent Oswald	-	CNC Machinist II
Mr. Chris Griffith	-	GO TEC Training Coordinator Region 3
Mr. Jonathan Hankins	-	CNC Machinist I

Approval of Minutes

- **Motion** - Mr. Mark Holland made a motion to approve the minutes from the Board of Trustees meeting held on November 16, 2023. Mr. Don Gibson seconded the motion. The motion passed unanimously.

Public Comment

Mr. Don Merricks called for public comment. Hearing none, he moved to the next agenda item.

Committee Reports and Actions

- **Manufacturing Advancement**

Mr. Ben Davenport filed the Manufacturing Advancement Committee report. There were no action items to be addressed by the full BOT. Ms. Amanda Hylton presented the quad chart report (Exhibit B) and the narrative report (Exhibit C) which included personnel updates, program developments, and contributions to the strategic plan. The Accelerated Training in Defense Manufacturing (ATDM) program is comprised of 47 instructors and staff. The program was in the process of reviewing 790 active applications. The program will welcome 122 students on February 19, 2024. Of those students, 108 are specifically for ATDM and 14 are for the Naval Aviation Schoolhouse for Additive Manufacturing (NASAM). The NASAM group is an active-duty military group from naval aviation. They are focused on targeted additive manufacturing training. The ATDM 3.0 budget, contracting status, and 5-year development plan were outlined. Progress was noted in the NAVAIR Additive Manufacturing Training program, the Defense Manufacturing Community Support Program (DMCSP), the Center for Manufacturing Advancement (CMA), and the Additive Manufacturing Center of Excellence (AM COE). An MOU was executed with Henry County Public Schools to expand the 9th and 10th-grade Manufacturing Academy. Coursework has been completed, and the equipment list is under review.

- **Applied Research**

Dr. Guru Ghosh filed the Applied Research Committee report. There were no action items to be addressed by the full BOT. Dr. Lowman presented the Applied Research quad chart report (Exhibit D) and the narrative report (Exhibit E). Dr. Lowman commented that there are presently ten full-time and four part-time employees in the research division. Each member of the staff works with different companies to support businesses from the entrepreneurial level to the business level. The report showcased the IALR/VT team's leadership in Virginia's Controlled Environment Agriculture (CEA) sphere. Their comprehensive program spans research, workforce development, and economic initiatives. The Aerofarms Collaboration focuses on targeted disease testing, indicating a shift toward innovation. New partnerships with entities like the Invasive Species Corporation and Canon Virginia highlight progress in herb growth projects and student recruitment, including a VT PhD student. Collaborative efforts like the GO Virginia CEA Roadmap Study rollout and VALOR Leadership group visits underscore the program's commitment. Substantial grants, including a proposed one-million-dollar State Budget allocation, demonstrate strong financial backing for CEA expansion. Economic development initiatives, SMART table installations, and JTI collaborations further amplify the program's impact. Simultaneously, the "AgTech and Life Sciences Manufacturing Support to Grow Industries Through Testing, Contract Research, and Lab Access" initiative accelerates progress in Virginia's life sciences sector, attracting interest from major companies and solidifying the program's role in innovation, workforce development, and economic growth.

- **Programs & Services – Advanced Learning Updates**

Dr. Greg Hodges filed the Programs & Services report. There were no action items to be addressed by the full BOT. Dr. Julie Brown referred to the Advanced Learning quad chart report (Exhibit F), and the narrative report (Exhibit G) detailing program activities and initiatives. The department has 12 active grants. Notably, a \$250 mini-grant supported veterans through a movie night gift partnership with the American Legion Dan River Post #1097 for MLK Day of Service. Pending grants include proposals for GO TEC® Region 3 Expansion (\$489,381), a contract with UVA's Weldon Cooper Center for GO TEC Evaluation (\$162,745), and a grant submission for Public Health AmeriCorps Year 3 (\$218,678). Personnel updates included the hiring of Ms. Angela Rigney as GO TEC Director and Mr. Chris Griffith as GO TEC Region 3 Training Coordinator. AmeriCorps updates highlighted recruitment, national conference participation, and community workshops. GO TEC™ initiatives, spanning various regions, featured tours, interviews, and bus activities. Additionally, EmPOWER career exposure, apprenticeship efforts, NCRC testing, REACH Partnership achievements, the Wonder Community, AET (Academy for Engineering and Technology), camps, outreach, and stakeholder engagements were emphasized. The departmental team comprises 14 full-time members and 19 AmeriCorps members.

- **Economic Development Update**

Ms. Linda Green presented the Southern Virginia Regional Alliance (SVRA) report (Exhibit H). She commented that JTI Leaf Services LLC in Danville announced an expansion that will result in 99 additional jobs. In addition, two expansion projects and two new projects are in the final incentive review. There are 27 active requests for proposals under review. The Virginia Commonwealth Transportation Board will host a 2-day meeting in April at IALR. Additional information on marketing, networking, and research are included in the report.

RECESS / RECONVENING

Mr. Merricks commented that the meeting would continue without a recess.

- **Operations & ICC Updates**

Dr. John Hughes provided updates on the ICC, Facilities, IT, and Communications departments. His full report is attached (Exhibit I).

Mr. Telly Tucker commented that due to the fluctuation in demand for conference services, broader regional conversations are underway to explore potential partnerships between IALR and other institutions with similar needs.

- **Resources & Controls**

- **IALR Report – FY2023 – 2nd Quarter Update**

Ms. Angie Anderson presented the BOT Financial Report as shown in (Exhibit J).

- **Motion** – Dr. Greg Hodges made a motion to approve the Financial Report.
Dr. Tiffany Franks seconded the motion. The motion passed unanimously.

Nominating Committee Update

Dr. Betty Jo Foster noted that in January, the committee comprised of Mr. Don Gibson, Dr. Greg Hodges, and herself convened to review the BOT membership. They identified three members eligible for reappointment

and one member’s term, appointed by the Governor, will end on June 30, 2024. In addition, the committee reviewed the slate of BOT officers for Fiscal Year 2025 and secured a commitment. The comprehensive report will be presented at the BOT meeting slated for May 16, 2024.

Leadership Reports

A. **BOT Chair’s Report**

Mr. Don Merricks commented on the importance of IALR’s relationship with the State.

B. **IALR President’s Report**

Mr. Telly Tucker highlighted various engagements and events documented in his report (Exhibit K). He noted that IALR currently employs 114 staff members. Additionally, Mr. Tucker, along with Dr. John Hughes, presented IALR's FY2023 Annual Report (Exhibit L) to the Danville City Council. A similar presentation was arranged with the Pittsylvania County Board of Supervisors for February 20, 2024. Furthermore, Mr. Tucker received a request from the Commonwealth's Deputy Secretary of Workforce, Deputy Secretary of Education, and Director of Virginia Workforce for a conference call, and they expressed interest in scheduling a visit to IALR. Mr. Tucker also mentioned providing testimony to the Virginia House Appropriations Subcommittee on Higher Education. He also met with Delegates Askew, Carr, Austin, Willett, House Appropriations staff, and Senate Appropriations staff regarding IALR's budget amendment and legislative bill.

New Business and Open Forum of Concerns/Issues/Observations for BOT

Dr. Betty Jo Foster commented on the community tours and the favorable comments she has heard.

Adjournment

Mr. Don Merricks declared the meeting adjourned at 11:13 a.m.

Minutes Recorded By:

Minutes Approved By:

Pam Patterson
Secretary, IALR Board of Trustees

Mr. Don Merricks
Chair, IALR Board of Trustees

Date

Date

A summary of Exhibits is included on the following page.

Summary of Exhibits

Exhibit A: Attendance Roster

Exhibit B: Manufacturing Advancement Quad Chart Report

Exhibit C: Manufacturing Advancement Narrative Report

Exhibit D: Applied Research Quad Chart Report

Exhibit E: Applied Research Narrative Report

Exhibit F: Programs & Services/Advanced Learning Quad Chart Report

Exhibit G: Programs & Services/Advanced Learning Narrative Report

Exhibit H: Economic Development/SVRA Quad Chart Report

Exhibit I: Operations & ICC Updates- Narrative Report

Exhibit J: Resources – IALR Financial Overview – Budget 12-31-23

Exhibit K: President’s Report – February 15, 2024

Exhibit L: IALR Annual Report - FY2023

DRAFT



IALR FOUNDATION BOARD OF DIRECTORS (FBOD)

Thursday, February 15, 2024 – 11:30 a.m. – Conference Room 205 – In Person

Minutes

<u>Foundation Board of Directors Present</u> Dr. Betty Jo Foster Mr. Lenard Lackey Ms. Leslie Mantiply Mr. Don Merricks, BOT Chair, <i>Ex Officio</i> Mr. Kunal Patel Mr. Lott Rogers, <i>President</i> Mr. Telly Tucker, IALR President, <i>Ex Officio</i>	<u>IALR Staff Present</u> Ms. Angie Anderson, Chief Finance Officer Ms. Pam Patterson, FBOD & BOT Secretary
<u>Foundation Board of Directors Unable to Attend</u> Mr. Jessie Barksdale Ms. Kathryn Roberts, <i>Vice President</i>	

Convening of Open Session

Mr. Lott Rogers, President, IALR Foundation Board of Directors (FBOD), called the meeting to order on Thursday, February 15, 2024, at 11:30 a.m. A quorum was present.

Approval of Minutes

- **Motion:** Dr. Betty Jo Foster made a motion to approve the minutes for the November 16, 2023, FBOD meeting. Mr. Lenard Lackey seconded the motion. The motion passed unanimously.

Smith Salley Wealth Management Presentation

Mr. Gregory Smith, Chairman, and Co-Founder, along with Mr. Brian May, Portfolio Manager

and Chief Compliance Officer for Smith Salley Wealth Management provided a brief overview (Exhibit A). They emphasized that their tenure with American National Bank and Trust Company came to an end due to the impending merger with Atlantic Union Bank. Furthermore, they elaborated on the advantages they could offer as portfolio managers for IALR.

American National Bank and Trust Company / Atlantic Union Bank Wealth Management Presentation

Mr. Ron Barner, Vice President/Trust Officer provided an overview of services (Exhibit B). Other attendees included:

Ms. Beverly Scruggs, SVP/Director of Business Development Bankers Insurance
Mr. Mitch York, Chief Investment Officer and Managing Director of Asset Management,
Atlantic Union Bank, Richmond, VA
Mr. John Ockerman, Director of Fixed Income, Asset Management, Atlantic Union Bank
Richmond, VA
Mr. Tom Funkhouser, Director of Investment Strategy, Asset Management, Atlantic
Union Bank, Richmond, VA (via Zoom)

Mr. Barner commented that he would remain the initial point of contact for IALR. He explained that Atlantic Union Bank had an in-house wealth management team which would eliminate the need for an outside contract.

Financial Report

Ms. Anderson presented the FBOD financial report as shown in (Exhibit C).

- **Motion:** Ms. Leslie Mantiply made a motion to accept the FBOD financial report. Mr. Kunal Patel seconded the motion. The motion passed by unanimously.

Discussion

A. **Wealth Management Team Selection**

Ms. Angie Anderson commented that it appeared both banks manage in very similar ways. She added that continuity of service with the American National Bank's current wealth management team would be easier for the IALR Finance Department; however, they would proceed in the manner most comfortable for the BOT.

Mr. Don Merricks commented that he was pleased to learn that Atlantic Union Bank had an in-house wealth management team. He added that he would like to see negotiation on the fee structure.

- **Motion** - Mr. Don Merricks made a motion to approve American National Bank/Atlantic Union Bank as the FBOD's wealth management team with the understanding that the financial advisor fee would be negotiated. Dr. Betty Jo Foster seconded the motion. The motion passed unanimously.

B. Approval of IALR STEM Scholarships for the Advanced Learning Department

Dr. Julie Brown submitted a request for a maximum of sixteen scholarships valued at \$1,000 each for IALR internships. She clarified that the internships would be intended for graduating high school seniors with an interest in pursuing a STEM field. The applications for STEM scholarships will be distributed across IALR's eight-locality footprint.

- **Motion:** Dr. Betty Jo Foster made a motion to approve the expenditure for up to sixteen \$1,000 IALR STEM scholarships. Mr. Lenard Lackey seconded the motion. The motion passed unanimously.

C. ReedSmith LLP – Engagement for Professional Services

Mr. Telly Tucker referred to the copy of the *Engagement for Professional Services* (Exhibit D) from ReedSmith LLP provided in the meeting documents. He commented that despite the expiration of IALR's engagement, ReedSmith, LLP had continued to provide their services. He explained that the current fee structure of \$42,000 per year was established in 2018 and was paid by IALR (\$12,000), and the Future of the Piedmont (FOTP) (\$30,000).

Mr. Edward Mullen, Managing Partner of the office in Richmond, VA, proposed a new annual fee of \$60,000, plus expenses, to be paid in monthly installments of \$5,000 plus expenses. Under the proposed structure, FOTP would contribute \$30,000 of the fee, and FBOD would contribute the remaining \$30,000.

Mr. Tucker expressed satisfaction with the quality of service provided by ReedSmith LLP, highlighting their reputable standing and strong relationships across both Democratic and Republican sectors.

- **Motion:** Mr. Kunal Patel made a motion to approve the ReedSmith LLP annual contract in the amount of \$60,000 with the fee being evenly split between the FBOD and the FOTP. Ms. Leslie Mantipty seconded the motion. The motion passed unanimously.

D. FBOD Nominating Committee

Mr. Don Merricks commented that according to the FBOD Bylaws, the Nominating Committee should consist of five members including the President. The members selected included:

Mr. Lott Rogers, President
Dr. Betty Jo Foster
Mr. Lenard Lackey
Ms. Leslie Mantiply, Chair
Mr. Kunal Patel

A meeting of the Nominating Committee will be scheduled by Ms. Mantiply. The report consisting of Elected Directors and Officers will be presented for approval at the Joint BOT & FBOD meeting scheduled for May 16, 2024.

- Action Item – Ms. Patterson was asked to send to the FBOD members a copy of the list of current terms.

Discussion

The Future of the FBOD

Mr. Tucker mentioned that in an upcoming meeting, he would like to discuss future plans for the FBOD. He suggested exploring the feasibility of employing someone dedicated to policy development, goal setting, sponsorship opportunities, and enhancing the Foundation's assets. He also noted that the Foundation has access to various grant opportunities that are not available to IALR.

Resignation of Ms. Cheryl Terry

Mr. Tucker mentioned that Ms. Cheryl Terry became a member of the FBOD on May 18, 2023, serving as an Elected Director. By December 2023, she transitioned to the role of Deputy Director, ATDM Training and Technology. Mr. Tucker indicated that he held a meeting with Ms. Terry to discuss her continued involvement with the FBOD. Subsequently, Ms. Terry opted to submit her resignation.

Adjournment

Mr. Lott Rogers declared the meeting adjourned at 1:30 p.m.

Signatures and Exhibits are shown on the following page.

Minutes Recorded By:

Minutes Approved By:

Pam Patterson
Secretary, IALR Board of Trustees

Lott Rogers
President, FBOD

Date

Date

Exhibits

- A. Smith Salley Wealth Management Presentation
- B. Atlantic Union Bank Wealth Management Presentation
- C. ReedSmith LLP – Letter of Engagement for Professional Services



Minutes

IALR FOUNDATION BOARD OF DIRECTORS (FBOD) NOMINATING COMMITTEE MEETING Monday, April 29, 2024 – 2:00 p.m. – via Zoom

<u>NOMINATING COMMITTEE ATTENDEES</u> Dr. Betty Jo Foster Mr. Lenard Lackey Ms. Leslie Mantiply, <i>Chair, Nominating Committee</i> Mr. Don Merricks, <i>Ex Officio</i> Mr. Kunal Patel Mr. Lott Rogers, <i>President</i> Mr. Telly Tucker, <i>Ex Officio</i> <u>Nominating Committee Members Unable to Attend</u> None	<u>IALR Staff Present</u> Ms. Pam Patterson, FBOD & BOT Secretary
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Convening of Open Session

Mr. Lott Rogers, President of the IALR Foundation Board of Directors (FBOD), called the Nominating Committee meeting to order on Monday, April 29, 2024, at 2:00 p.m. A quorum was present.

New Business

A. Election of FBOD Officers for FY2025

The Nominating Committee will present to the FBOD the following slate of officers at the Joint Annual BOT & FBOD Meeting scheduled for Thursday, May 16, 2024.

Ms. Leslie Mantiply, President
Ms. Kathryn Roberts, Vice President
Ms. Angie Anderson, Treasurer
Ms. Pam Patterson, Secretary

Adjournment

- **Motion** – Mr. Lenard Lackey made a motion to adjourn the meeting. Mr. Kunal Patel seconded the motion. The meeting was adjourned at 2:33 p.m.

Minutes Recorded By:

Minutes Approved By:

Pam Patterson
Secretary, FBOD

Lott Rogers
President, FBOD

Date

Date

Exhibits

None

IALR Financial Overview

1. Budget, 03 31 2024
2. Financial Result Summary

Institute for Advanced Learning and Research
2024 YTD Current Rev, Exp, & Changes in Net Assets by Dept.
Period Ending 3/31/24

	Budget					Remaining	75% 9 Mo Target
	06/30/2024	1st Qtr	2nd Qtr	3rd Qtr	Total	Balance	Spent
Revenues							
00 - General	\$ 8,027,074	\$ 2,320,869	\$ 2,614,994	\$ 2,255,669	\$ 7,191,532	\$ 835,542	
10 - Research	\$ 50,000	\$ -	\$ 69,998	\$ 57,391	\$ 127,389	\$ (77,389)	
40 - Advanced Learning	\$ 3,000	\$ 10,230	\$ 555	\$ 3,055	\$ 13,840	\$ (10,840)	
60 - Conference Services	\$ 710,000	\$ 203,132	\$ 317,012	\$ 242,635	\$ 762,778	\$ (52,778)	
74 - Facility Op & Maintenance	\$ 911,043	\$ 222,175	\$ 212,142	\$ 202,981	\$ 637,297	\$ 273,746	
76 - Technology Support	\$ 1,200	\$ 80	\$ -	\$ -	\$ 80	\$ 1,120	
84 - Central	\$ -	\$ -	\$ 4,622	\$ 3,067	\$ 7,690	\$ (7,690)	
91 - Economic Development & Busines	\$ 160,000	\$ 49,829	\$ 178,069	\$ 29,200	\$ 257,098	\$ (97,098)	
99 - Capital Improvements	\$ 222,934	\$ -	\$ 182,581	\$ -	\$ 182,581	\$ 40,353	
Total Revenues	\$ 10,085,251	\$ 2,806,315	\$ 3,579,974	\$ 2,793,997	\$ 9,180,286	\$ 904,965	91.03%
Expenses							
00 - General	\$ 524,172	\$ 175,685	\$ 181,660	\$ 173,268	\$ 530,612	\$ (6,440)	101.23%
10 - Research	\$ 958,624	\$ 217,769	\$ 210,726	\$ 213,991	\$ 642,487	\$ 316,137	67.02%
40 - Advanced Learning	\$ 864,009	\$ 139,143	\$ 127,679	\$ 239,995	\$ 506,818	\$ 357,191	58.66%
55 - Center for Advanced Manufactur	\$ 407,592	\$ 101,898	\$ 101,898	\$ 101,898	\$ 305,694	\$ 101,898	75.00%
60 - Conference Services	\$ 996,156	\$ 212,450	\$ 254,153	\$ 246,648	\$ 713,251	\$ 282,905	71.60%
70 - Finance	\$ 493,389	\$ 141,478	\$ 134,637	\$ 120,014	\$ 396,130	\$ 97,259	80.29%
74 - Facility Op & Maintenance	\$ 2,144,765	\$ 389,298	\$ 501,403	\$ 466,634	\$ 1,357,335	\$ 787,430	63.29%
76 - Technology Support	\$ 821,516	\$ 181,749	\$ 201,005	\$ 217,159	\$ 599,913	\$ 221,603	73.03%
82 - Human Resources	\$ 408,777	\$ 120,415	\$ 118,956	\$ 6,904	\$ 246,274	\$ 162,503	60.25%
84 - Central	\$ 414,691	\$ 65,963	\$ 40,194	\$ 140,859	\$ 247,016	\$ 167,675	59.57%
88 - Executive	\$ 815,030	\$ 208,243	\$ 183,720	\$ 188,885	\$ 580,847	\$ 234,183	71.27%
91 - Economic Development & Busines	\$ 638,411	\$ 233,514	\$ 166,982	\$ 151,068	\$ 551,563	\$ 86,848	86.40%
94 - Public Relations	\$ 375,185	\$ 87,147	\$ 101,709	\$ 100,850	\$ 289,706	\$ 85,479	77.22%
99 - Capital Improvements	\$ 222,934	\$ 32,486	\$ 146,599	\$ 8,840	\$ 187,925	\$ 35,009	84.30%
Total Expenses	\$ 10,085,251	\$ 2,307,237	\$ 2,471,321	\$ 2,377,013	\$ 7,155,572	\$ 2,929,679	70.95%
NET SURPLUS/(DEFICIT)	\$ -	\$ 499,077	\$ 1,108,653	\$ 416,984	\$ 2,024,714	\$ (2,024,714)	20.08%

INSTITUTE FOR ADVANCED LEARNING AND RESEARCH
FY2024 BOARD REPORT - March 31, 2024
FINANCIAL RESULT SUMMARY

1) ACCOUNTS RECEIVABLE

3/31/2023		3/31/2024	
A/R Bal	Over 30	A/R Bal	Over 30
\$1,700,465	\$428,879	\$4,614,670	\$853,445

2) IALR CASH

UNRESTRICTED IALR CASH

	2023 YTD	2023 3rd Quarter	2024 3rd Quarter
CASH RESERVE - BALANCE	\$1,900,000	\$1,900,000	\$1,938,372
OPERATING - BALANCE	\$233,766	\$1,607,552	\$2,561,275
TOTAL UNRESTRICTED IALR CASH	\$2,133,766	\$3,507,552	\$4,499,647

	2023 YTD	2023 3rd Quarter	2024 3rd Quarter
RESTRICTED IALR CASH			
NON-FEDERAL - BALANCE	\$3,901,789	\$5,131,267	\$3,195,525

Restricted Funds:

CHW Restricted - Cash	\$3,798	\$3,798	\$3,798
Capstone Restricted - Cash	\$0	\$0	\$0
Account Beginning Balance	\$3,000	\$3,000	\$3,000
Career Expo	\$23,122	\$38,159	\$7,547
Robert Woods Johnson	\$0	\$0	\$0
Americorp/ServeIT	\$24,239	\$47,112	\$94,479
DRF - STEM-H	\$133	\$133	\$0
STEM-H Various Donors	\$1,953	\$1,953	\$0
DRF-DRRC	\$103,129	\$116,194	\$72,959
Industrial Hemp Summit	\$0	\$0	\$0
Industry 4.0 - DRF Grant	\$1,521,451	\$1,521,451	\$862,880
GOVa Major Clarity	\$0	\$0	\$0
FOP - Regional Food Systems	\$100,000	\$100,000	\$100,000
Life Long Learning	\$223	\$201	\$758
REACH	\$635,626	\$924,357	\$1,594,152
CMA - DRF Funding	\$1,234,880	\$2,220,950	\$0
Experience Works - Intern Program	\$67,650	\$67,668	\$61,847
Experience Works - Match Funding	(\$5,663)	\$1,965	\$127,394
SCHEV	\$0	\$0	\$211,075
<i>Restricted Funds at 3/31/24</i>	\$3,713,540	\$5,046,940	\$3,139,889

Reconciling Items:

Money moved after 3/31	\$188,249	\$84,327	\$55,635
Cash Receipts Received	\$0	\$0	\$0
	\$3,901,789	\$5,131,267	\$3,195,525

	2023 YTD	2023 3rd Quarter	2024 3rd Quarter
RESTRICTED IALR CASH			
FEDERAL - BALANCE	\$2,271,257	\$3,385,602	\$10,079,564

Restricted Funds:

Account Beginning Balance	\$3,000	\$3,000	\$3,000
DOD-ATDM 1.0	\$0	\$875,599	\$0
DOD-ATDM 2.0	\$1,971,176	\$2,411,596	\$4,115,038
DOD-ATDM 3.0	\$276,090	\$25,000	\$276,090
Afghan #4	\$0	\$365	\$7,996
Afghan #5	\$0	\$7,820	\$51,614
BFA - Submarine	\$20,991	\$38,007	\$16,416
BFA - Mahmood	\$0	\$24,216	\$4,008
EDA - CMA Equipment	\$0	\$0	\$0
BFA - RTC Long Lead	\$0	\$0	\$4,368,547
AMPRO SOW #1	\$0	\$0	\$26,041
AMPRO SOW #2	\$0	\$0	\$58,445
AMPRO SOW #3	\$0	\$0	\$0
BFA - NAVAIR	\$0	\$0	\$882,196
ROCK ISLAND - RTC CONSTRUCTION	\$0	\$0	\$270,203
Bank Fee	\$0	\$0	(\$30)
	\$2,271,257	\$3,385,602	\$10,079,564

3) **Advanced Manufacturing Cash**

	2023 YTD	2023 3rd Quarter	2024 3rd Quarter
ADVANCED MANUFACTURING	\$899,962	\$0	\$917,251
<i>Restricted Funds:</i>			
Account Beginning Balance	\$3,000	\$0	\$3,000
ATDM 1.0	\$875,599	\$0	\$875,599
Afghan #1	\$365	\$0	\$365
Afghan #2	\$7,820	\$0	\$7,820
Afghan #3	\$13,178	\$0	\$13,178
Interest	\$0	\$0	\$17,290
	<u>\$899,962</u>	<u>\$0</u>	<u>\$917,251</u>

4) **FOUNDATION CASH**

	2023 YTD	2023 3rd Quarter	2024 3rd Quarter
FOUNDATION - CASH (Checking)	\$446,682	\$873,383	\$703,987
Foundation Restricted - Cash	\$200,571	\$200,571	\$261,076
Foundation Unrestricted - Cash	\$246,111	\$672,812	\$442,911
FOUNDATION INVESTMENTS			
FOUNDATION - INVESTMENTS			
Foundation CD's	\$332,748	\$331,487	\$332,748
Foundation Endowment	\$1,497,793	\$1,438,986	\$1,658,414
Foundation Investment	\$1,204,983	\$1,154,099	\$1,334,919
TOTAL FOUNDATION - INVESTMENTS	<u>\$3,035,524</u>	<u>\$2,924,572</u>	<u>\$3,326,081</u>

5) **MONEY MOVEMENT**

FOUNDATION TO IALR	January	February	March	Total for 3rd Qtr	Restricted / Unrestricted
REIMBURSEMENT FROM ALL OTHER GRANTS	\$5,507	\$766	\$290	\$6,563	UNRESTRICTED
FEDERAL TO IALR	January	February	March	Total for 3rd Qtr	Restricted / Unrestricted
REIMBURSEMENT FROM DOD-ATDM 3.0	\$2,166,013	\$1,004,898	\$1,080,338	\$4,251,249	UNRESTRICTED
REIMBURSEMENT FROM EDA-CMA EQUIPMENT	\$0	\$0	\$0	\$0	UNRESTRICTED
REIMBURSEMENT FROM BFA - SUBMARINE	\$0	\$0	\$0	\$0	UNRESTRICTED
REIMBURSEMENT FROM BFA-RTC LONG LEAD	\$1,004,462	\$255,919	\$0	\$1,260,381	UNRESTRICTED
REIMBURSEMENT FROM EB2- ATDM	\$285,425	\$0	\$0	\$285,425	UNRESTRICTED
REIMBURSEMENT FROM BFA - MAHMOOD	\$0	\$0	\$0	\$0	UNRESTRICTED
REIMBURSEMENT FROM BFA - AFGHAN #4	\$0	\$0	\$0	\$0	UNRESTRICTED
REIMBURSEMENT FROM BFA - AFGHAN #5	\$0	\$0	\$0	\$0	UNRESTRICTED
REIMBURSEMENT FROM AUSTAL - AMPRO #1	\$0	\$173,958	\$0	\$173,958	UNRESTRICTED
REIMBURSEMENT FROM AUSTAL - AMPRO #2	\$0	\$83,330	\$0	\$83,330	UNRESTRICTED
REIMBURSEMENT FROM AUSTAL - AMPRO #3	\$0	\$1,011,454	\$0	\$1,011,454	UNRESTRICTED
REIMBURSEMENT FROM DOD - RTC CONSTRUCTION	\$2,836,448	\$0	\$7,828,984	\$10,665,432	UNRESTRICTED
IALR TO FOUNDATION	January	February	March	Total for 3rd Qtr	Restricted / Unrestricted
DONATION TO FOUNDATION	\$0	\$0	\$0	\$0	UNRESTRICTED
Non-Federal to IALR	January	February	March	Total for 3rd Qtr	Restricted / Unrestricted
REIMBURSE IALR FOR CHW	\$96,584	\$179,226	\$25,176	\$300,986	UNRESTRICTED
REIMBURSE IALR FOR GRANT ACTIVITY	\$14,253	(\$143,612)	\$30,549	(\$98,810)	UNRESTRICTED

IALR

1. Income Statement
2. Grant and Capital Projects
Activity
3. Statement of Net Position

Institute for Advanced Learning and Research

Income Statement - Budget to Actual QTD & YTD

Period Ending March 31, 2024

	Budget FY24	Actual 09/30/2023 QTD	Actual 12/31/2023 QTD	Actual 03/31/2024 QTD	Total	Over/(Under) Budget 06/30/2024	75% 9 Mo Target Spent
Revenues							
Sales	\$ 709,500	\$ 202,725	\$ 316,775	\$ 242,483	\$ 761,983	\$ 52,483	
Program Income	\$ 53,000	\$ 10,230	\$ 234,553	\$ 60,011	\$ 304,794	\$ 251,794	
Indirect Cost Recovery	\$ 418,944	\$ 364,639	\$ 292,479	\$ 220,898	\$ 878,016	\$ 459,072	
Recovered Costs	\$ 534,158	\$ 107,537	\$ 103,023	\$ 94,262	\$ 304,822	\$ (229,336)	
Other Revenue	\$ 91,700	\$ 42,613	\$ 21,648	\$ 20,432	\$ 84,693	\$ (7,007)	
Rental Revenue	\$ 456,885	\$ 122,400	\$ 121,619	\$ 121,219	\$ 365,237	\$ (91,648)	
Profit Margin	\$ -	\$ 121,987	\$ 117,586	\$ 114,070	\$ 353,643	\$ 353,643	
Total Operating Revenues:	\$ 2,264,187	\$ 972,131	\$ 1,207,682	\$ 873,375	\$ 3,053,189	\$ 789,002	
State Appropriation	\$ 7,323,958	\$ 1,830,989	\$ 1,830,667	\$ 1,833,256	\$ 5,494,913	\$ (1,829,045)	
VA College Building Authority (VCBA)	\$ 497,106	\$ -	\$ 451,130	\$ -	\$ 451,130	\$ (45,976)	
Interest Income	\$ -	\$ 3,194	\$ 90,494	\$ 87,365	\$ 181,053	\$ 181,053	
Total Non-Operating Revenues:	\$ 7,821,064	\$ 1,834,184	\$ 2,372,292	\$ 1,920,622	\$ 6,127,097	\$ (1,693,967)	
Total Revenues:	\$ 10,085,251	\$ 2,806,315	\$ 3,579,974	\$ 2,793,997	\$ 9,180,286	\$ (904,965)	91%
Expenses							
Personnel Costs	\$ 4,747,788	\$ 1,130,855	\$ 1,040,738	\$ 1,010,463	\$ 3,182,056	\$ (1,565,732)	
Contractual Services and Consultants	\$ 1,596,410	\$ 367,982	\$ 399,331	\$ 452,587	\$ 1,219,900	\$ (376,510)	
Supplies and Equipment Maintenance	\$ 112,762	\$ 29,507	\$ 28,134	\$ 36,771	\$ 94,412	\$ (18,350)	
Facility Expense	\$ 884,783	\$ 179,497	\$ 232,555	\$ 223,969	\$ 636,021	\$ (248,762)	
Telecommunication	\$ 80,918	\$ 15,694	\$ 22,932	\$ 24,390	\$ 63,016	\$ (17,903)	
Utilities	\$ 623,500	\$ 116,654	\$ 181,039	\$ 153,618	\$ 451,311	\$ (172,189)	
Repairs and Maintenance	\$ 905,877	\$ 183,850	\$ 165,187	\$ 177,124	\$ 526,161	\$ (379,716)	
Equipment Expense	\$ 579,372	\$ 15,600	\$ 9,090	\$ 14,904	\$ 39,593	\$ (539,779)	
Other Expenses	\$ 303,841	\$ 71,034	\$ 40,189	\$ 38,246	\$ 149,469	\$ (154,372)	
Depreciation and Amortization	\$ 250,000	\$ 175,297	\$ 181,812	\$ 172,583	\$ 529,692	\$ 279,692	
Capital Equipment & Construction	\$ -	\$ 21,269	\$ 170,313	\$ 72,360	\$ 263,942	\$ 263,942	
Total Operating Expenses	\$ 10,085,251	\$ 2,307,238	\$ 2,471,321	\$ 2,377,014	\$ 7,155,572	\$ (2,929,679)	
Total Operating Expenses:	\$ 10,085,251	\$ 2,307,238	\$ 2,471,321	\$ 2,377,014	\$ 7,155,572	\$ (2,929,679)	71%
NET SURPLUS/(DEFICIT)	\$ -	\$ 499,077	\$ 1,108,653	\$ 416,984	\$ 2,024,714	\$ 2,024,714	20%

Institute for Advanced Learning and Research

Income Statement - Grant and Capital Projects QTD & YTD

Period Ending March 31, 2024

	Actual 09/30/2023 QTD	Actual 12/31/2023 QTD	Actual 03/31/2024 QTD	Total
Revenues				
Federal Grants-Temporarily Restricted	\$56,889	\$444,406	\$83,910	\$585,205
Nongovernmental Grants and Contracts	\$393,900	\$1,395,183	\$1,517,241	\$3,306,324
Program Income	\$6,661,768	\$12,862,567	\$14,230,575	\$33,754,910
Other Revenue	\$0	\$86	\$336,000	\$336,086
Total Operating Revenues:	\$7,112,557	\$14,702,242	\$16,167,725	\$37,982,525
Total Revenues:	\$7,112,557	\$14,702,242	\$16,167,725	\$37,982,525
Expenses				
Personnel Costs	\$1,396,533	\$1,711,334	\$2,088,782	\$5,196,650
Contractual Services and Consultants	\$1,293,813	\$1,097,921	\$1,457,911	\$3,849,645
Supplies and Equipment Maintenance	\$201,253	\$285,063	\$373,924	\$860,240
Facility Expense	\$91,233	\$103,376	\$96,145	\$290,755
Utilities	\$24,743	\$38,867	\$36,829	\$100,439
Repairs and Maintenance	\$20,999	\$47,091	\$32,966	\$101,056
Equipment Expense	\$166,411	\$680,185	\$405,006	\$1,251,602
Other Expenses	\$2,000,050	\$1,527,050	\$1,398,435	\$4,925,535
Depreciation and Amortization	\$804,123	\$860,107	\$870,473	\$2,534,703
Construction in Process & Equipment	\$2,172,048	\$4,925,379	\$11,569,886	\$18,667,313
Total Operating Expenses	\$8,171,206	\$11,276,373	\$18,330,358	\$37,777,937
Total Operating Expenses:	\$8,171,206	\$11,276,373	\$18,330,358	\$37,777,937
NET SURPLUS/(DEFICIT)	(\$1,058,649)	\$3,425,869	(\$2,162,632)	\$204,588
NET SURPLUS/(DEFICIT) %	-15%	23%	-13%	1%

Institute for Advanced Learning and Research

IALR Statement of Net Position

3/31/2023 vs. 3/31/2024 Comparison

	3/31/23 IALR Total	3/31/24 IALR Total	Variance
Assets			
Current Assets:			
Unrestricted			
Cash and Cash Equivalents	\$14,022,757	\$21,204,420	\$7,181,663
Accounts Receivable, net	\$4,395,151	\$4,864,865	\$469,714
Prepaid Expenses	\$286,967	\$345,152	\$58,185
Interfund	\$317,599	\$161,471	(\$156,128)
Total Unrestricted Current Assets:	\$19,022,475	\$26,575,908	\$7,553,433
Other Assets:			
Restricted Cash and Cash Equivalents	\$183,108	\$231,052	\$47,945
Total Other Assets:	\$183,108	\$231,052	\$47,945
Total Current Assets:	\$19,205,583	\$26,806,961	\$7,601,378
Noncurrent Assets:			
Net Pension Asset	\$1,079,812	\$1,006,130	(\$73,682)
Fixed Assets Depreciable	\$43,033,279	\$66,204,649	\$23,171,370
Total Noncurrent Assets:	\$44,113,091	\$67,210,779	\$23,097,688
Total Assets	\$63,318,674	\$94,017,739	\$30,699,066
Deferred Outflows of Resources-VRS Charges	\$184,700	\$161,802	(\$22,898)
Liabilities and Net Position			
Current Liabilities:			
Accounts payable - Operations	\$1,116,194	\$955,459	(\$160,735)
Accrued Payroll and Related Employee Expenses	\$43,682	\$51,681	\$7,999
Deferred Revenue	\$5,612,012	\$7,514,756	\$1,902,744
Customer Deposits	\$61,563	\$117,210	\$55,647
Total Current Liabilities:	\$6,833,451	\$8,639,105	\$1,805,655
Noncurrent Liabilities			
Long Term Liabilities	\$154,149	\$169,259	\$15,110
Total Noncurrent Liabilities:	\$154,149	\$169,259	\$15,110
Deferred Inflows of Resources - VRS Investment Income	(\$944,983)	(\$505,969)	\$439,014
Net Position:			
Restricted	\$44,708,881	\$66,873,143	\$22,164,261
Unrestricted	\$10,839,476	\$17,992,066	\$7,152,590
Total Net Position:	\$55,548,357	\$84,865,209	\$29,316,851
Total Liabilities and Net Assets	\$63,480,940	\$94,179,541	\$30,698,602

Advanced Manufacturing **Division**

1. Advanced Manufacturing
Budget to Actual
2. Advanced Manufacturing
Grant & Contract Activity

Institute for Advanced Learning and Research

Income Statement

Manufacturing Advancement Division

		CMA IALR 40-55- xxxx-922	Adv. Manufacturin 40-55-xxxx	Capstone 40-50- xxxx	Rapid Launch 40-55- xxxx-921	Adv. Manufacturin Total Budget	CMA IALR Actual	Adv. Manufacturin Actual	Capstone Actual	Rapid Launch Actual	Total Adv. Manufa Revenue & Expens	Remaining Balance	75.00% 9 Mo Target Spent
Revenues													
14-55-4911	Grants-Center for Advanced Manu	\$ 500,000	\$ -	\$ -	\$ -	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000	
40-50-4411	Program Income-Capstone	\$ -	\$ -	\$ 135,000	\$ -	\$ 135,000	\$ -	\$ -	\$ 24,932	\$ -	\$ 24,932	\$ 110,068	
40-50-4435	IALR Support-Capstone	\$ -	\$ -	\$ 407,592	\$ -	\$ 407,592	\$ -	\$ -	\$ 305,694	\$ -	\$ 305,694	\$ 101,898	
40-50-4891	Miscellaneous Revenue-Capstone	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,156	\$ -	\$ 5,156	\$ (5,156)	
40-55-4211	Reimbursable & Donated Revenue-Center for I	\$ -	\$ -	\$ -	\$ 52,000	\$ 52,000	\$ 34,489	\$ -	\$ -	\$ 59,068	\$ 93,557	\$ (41,557)	
40-55-4411	Program Income-Center for Advanced Manu	\$ 40,000	\$ -	\$ -	\$ -	\$ 40,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 40,000	
40-55-4425	Optimization Revenue-Center for Advanced Ma	\$ 93,750	\$ -	\$ -	\$ -	\$ 93,750	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 93,750	
40-55-4430	Metrology Revenue-Center for Advanced Manu	\$ 44,944	\$ -	\$ -	\$ -	\$ 44,944	\$ 14,051	\$ -	\$ -	\$ -	\$ 14,051	\$ 30,893	
40-55-4511	Partner Office Rental-Center for Advanced Mar	\$ 337,242	\$ -	\$ -	\$ 80,400	\$ 417,642	\$ 305,023	\$ -	\$ -	\$ 113,794	\$ 418,817	\$ (1,175)	
40-55-4711	Indirect Costs-Center for Advanced Manu	\$ -	\$ 963,213	\$ -	\$ -	\$ 963,213	\$ 141,984	\$ 944,401	\$ -	\$ -	\$ 1,086,384	\$ (123,171)	
40-55-4712	Profits Earned-Center for Advanced Manu	\$ -	\$ 1,467,141	\$ -	\$ -	\$ 1,467,141	\$ 195,955	\$ 1,218,617	\$ -	\$ -	\$ 1,414,571	\$ 52,570	
40-55-4853	CMA Partner Program-Center for Advanced Ma	\$ 100,000	\$ 35,000	\$ -	\$ -	\$ 135,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 135,000	
40-55-4891	Miscellaneous Revenue-Center for Advanced M	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,537	\$ -	\$ -	\$ 8,537	\$ (8,537)	
Total Revenues		\$ 1,115,936	\$ 2,465,354	\$ 542,592	\$ 132,400	\$ 4,256,282	\$ 691,502	\$ 2,171,554	\$ 335,782	\$ 172,861	\$ 3,371,699	\$ 884,583	79.22%
Expenses													
Staffing													
Total Staffing		\$ 883,572	\$ 1,107,195	\$ 95,413	\$ -	\$ 2,086,180	\$ 202,722	\$ 130,410	\$ 41,839	\$ -	\$ 374,970	\$ 1,711,210	17.97%
Other Expenses													
14-55-6715	Supplies/Other Operating-Center for Advanced	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
14-55-6922	Janitorial-Center for Advanced Manu	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (86)	\$ 86	
14-55-6932	Gas-Center for Advanced Manu	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,427	\$ (6,427)	
40-50-6111	Consulting & Professional Fees-Capstone	\$ -	\$ -	\$ 337,636	\$ -	\$ 337,636	\$ -	\$ -	\$ 87,238	\$ -	\$ 87,238	\$ 250,398	
40-50-6800	HTec Consumables-Capstone	\$ -	\$ -	\$ 8,043	\$ -	\$ 8,043	\$ -	\$ -	\$ 1,054	\$ -	\$ 1,054	\$ 6,989	
40-50-6931	Electric-Capstone	\$ -	\$ -	\$ 55,000	\$ -	\$ 55,000	\$ -	\$ -	\$ 37,739	\$ -	\$ 37,739	\$ 17,261	
40-50-6932	Gas-Capstone	\$ -	\$ -	\$ 15,000	\$ -	\$ 15,000	\$ -	\$ -	\$ 5,579	\$ -	\$ 5,579	\$ 9,421	
40-50-6933	Water-Capstone	\$ -	\$ -	\$ 1,500	\$ -	\$ 1,500	\$ -	\$ -	\$ 1,968	\$ -	\$ 1,968	\$ (468)	
40-50-8510	Equip-Less than Capitalization-Capstone	\$ -	\$ -	\$ 30,000	\$ -	\$ 30,000	\$ -	\$ -	\$ 14,966	\$ -	\$ 14,966	\$ 15,034	
40-55-6111	Consulting & Professional Fees-Center for Adv	\$ -	\$ 205,000	\$ -	\$ -	\$ 205,000	\$ 7,086	\$ 143,641	\$ -	\$ -	\$ 150,726	\$ 54,274	
40-55-6121	Legal Fees-Center for Advanced Manu	\$ -	\$ 50,000	\$ -	\$ -	\$ 50,000	\$ -	\$ 14,332	\$ -	\$ -	\$ 14,332	\$ 35,668	
40-55-6711	Office Supplies-Center for Advanced Manu	\$ 12,500	\$ -	\$ -	\$ -	\$ 12,500	\$ 7,241	\$ 539	\$ -	\$ -	\$ 7,780	\$ 4,720	
40-55-6715	Supplies/Other Operating-Center for Advanced	\$ 39,436	\$ 8,240	\$ -	\$ -	\$ 47,676	\$ 66,942	\$ 3,170	\$ -	\$ -	\$ 70,112	\$ (22,436)	
40-55-6721	Postage-Center for Advanced Manu	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 330	\$ -	\$ -	\$ -	\$ 330	\$ (330)	
40-55-6731	Copier Lease-Center for Advanced Manu	\$ 3,500	\$ 1,750	\$ -	\$ -	\$ 5,250	\$ 4,472	\$ 245	\$ -	\$ -	\$ 4,717	\$ 533	
40-55-6922	Janitorial-Center for Advanced Manu	\$ 45,000	\$ -	\$ -	\$ 8,400	\$ 53,400	\$ 20,041	\$ -	\$ -	\$ 4,613	\$ 24,654	\$ 28,746	
40-55-6923	Waste Disposal-Center for Advanced Manu	\$ 2,966	\$ -	\$ -	\$ -	\$ 2,966	\$ 4,787	\$ -	\$ -	\$ 2,781	\$ 7,568	\$ (4,602)	
40-55-6924	Landscaping-Center for Advanced Manu	\$ 50,000	\$ -	\$ -	\$ 15,600	\$ 65,600	\$ 7,250	\$ -	\$ -	\$ 9,100	\$ 16,350	\$ 49,250	
40-55-6931	Electric-Center for Advanced Manu	\$ 202,950	\$ -	\$ -	\$ 60,000	\$ 262,950	\$ 117,088	\$ (4,547)	\$ -	\$ 58,478	\$ 171,019	\$ 91,931	
40-55-6932	Gas-Center for Advanced Manu	\$ 69,495	\$ -	\$ -	\$ 6,000	\$ 75,495	\$ 1,724	\$ (1,782)	\$ -	\$ 6,593	\$ 6,535	\$ 68,960	
40-55-6933	Water-Center for Advanced Manu	\$ 9,225	\$ -	\$ -	\$ 2,500	\$ 11,725	\$ 3,575	\$ (102)	\$ -	\$ 1,904	\$ 5,377	\$ 6,348	
40-55-6941	HVAC Service Agreement-Center for Advanced	\$ 75,000	\$ -	\$ -	\$ 22,644	\$ 97,644	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 97,644	
40-55-6942	Elevator Service Agreement-Center for Advanc	\$ 2,906	\$ -	\$ -	\$ -	\$ 2,906	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,906	
40-55-6945	Fire Pump and Sprinkler System-Center for Adv	\$ 2,900	\$ -	\$ -	\$ 375	\$ 3,275	\$ -	\$ -	\$ -	\$ 375	\$ 375	\$ 2,900	
40-55-6948	Fire & Sec System Monitoring-Center for Advai	\$ -	\$ -	\$ -	\$ 865	\$ 865	\$ -	\$ 220	\$ -	\$ 28	\$ 248	\$ 618	
40-55-6949	Air Compressor Serv Contract-Center for Advar	\$ -	\$ -	\$ -	\$ 4,140	\$ 4,140	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,140	
40-55-6960	Repairs & Maintenance-Center for Advanced M	\$ 40,749	\$ -	\$ -	\$ 20,000	\$ 60,749	\$ 10,104	\$ -	\$ -	\$ 1,014	\$ 11,118	\$ 49,631	10

40-55-6965	Maintenance Agreements & Licenses-Center fo	\$	286,124	\$	-	\$	-	\$	26,864	\$	312,988	\$	69,880	\$	-	\$	-	\$	20,464	\$	90,345	\$	222,643	
40-55-6980	Insurance-Center for Advanced Manu	\$	15,000	\$	-	\$	-	\$	-	\$	15,000	\$	12,310	\$	-	\$	-	\$	-	\$	12,310	\$	2,691	
40-55-7551	Travel-Center for Advanced Manu	\$	-	\$	15,450	\$	-	\$	-	\$	15,450	\$	2,151	\$	3,451	\$	-	\$	-	\$	5,602	\$	9,848	
40-55-7571	Business Meals-Center for Advanced Manu	\$	-	\$	10,150	\$	-	\$	-	\$	10,150	\$	323	\$	2,847	\$	-	\$	-	\$	3,170	\$	6,980	
40-55-8320	Marketing-Center for Advanced Manu	\$	15,000	\$	-	\$	-	\$	-	\$	15,000	\$	-	\$	-	\$	-	\$	-	\$	-	\$	15,000	
40-55-8410	Miscellaneous Expenditures-Center for Advance	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	30,054	\$	-	\$	-	\$	30,054	\$	(30,054)	
40-55-8490	Operating Contingency-Center for Advanced M	\$	-	\$	327,194	\$	-	\$	-	\$	327,194	\$	-	\$	-	\$	-	\$	-	\$	-	\$	327,194	
40-55-8510	Equip-Less than Capitalization-Center for Advai	\$	50,000	\$	15,000	\$	-	\$	-	\$	65,000	\$	68,290	\$	184	\$	-	\$	-	\$	68,474	\$	(3,474)	
40-55-8954	Furniture-Center for Advanced Manu	\$	-	\$	-	\$	-	\$	-	\$	-	\$	5,186	\$	-	\$	-	\$	-	\$	5,186	\$	(5,186)	
40-55-8956	Equipment-Center for Advanced Manu	\$	-	\$	-	\$	-	\$	-	\$	-	\$	44,286	\$	-	\$	-	\$	-	\$	44,286	\$	(44,286)	
Total		\$	922,751	\$	632,784	\$	447,179	\$	167,388	\$	2,170,102	\$	453,065	\$	192,251	\$	148,544	\$	105,351	\$	905,551	\$	1,264,551	41.73%
Total Expenses		\$	1,806,323	\$	1,739,979	\$	542,592	\$	167,388	\$	4,256,282	\$	655,787	\$	322,661	\$	190,383	\$	105,351	\$	1,280,522	\$	2,975,760	30.09%
NET SURPLUS/(DEFICIT)		\$	(690,387)	\$	725,375	\$	-	\$	(34,988)	\$	-	\$	35,714	\$	1,848,894	\$	145,399	\$	67,511	\$	2,091,177	\$	(2,091,177)	49.13%

Manufacturing Advancement Division
Grants & Contracts Activity

Closed Contracts:

ATDM 1.0			
	Budget	Actual	Remaining Balance
Revenue	\$ 7,664,592	\$ 7,664,592	\$ -
Expenses	\$ 7,664,592	\$ 6,788,993	\$ 875,599
Surplus/ (Deficit)	\$ -	\$ 875,599	
Closed - Money Moved 4/7/23			

Afghan Ally #1			
	Budget	Actual	Remaining Balance
Revenue	\$ 53,710	\$ 53,710	\$ -
Expenses	\$ 53,710	\$ 53,345	\$ 365
Surplus/ (Deficit)	\$ -	\$ 365	
Closed - Money Moved 4/7/23			

Afghan Ally #2			
	Budget	Actual	Remaining Balance
Revenue	\$ 37,450	\$ 37,450	\$ -
Expenses	\$ 37,450	\$ 29,629	\$ 7,820
Surplus/ (Deficit)	\$ -	\$ 7,820	\$ (7,820)
% Spend	Closed - Money Moved 6/29/23		

Afghan Ally #3			
	Budget	Actual	Remaining Balance
Revenue	\$ 92,180	\$ 92,180	\$ -
Expenses	\$ 92,180	\$ 79,002	\$ 13,178
Surplus/ (Deficit)	\$ -	\$ 13,178	\$ (13,178)
% Spend	Closed - Money Moved 6/29/23		

ATDM EB1 RTC A&E			
	Budget	Actual	Remaining Balance
Revenue	\$ 1,500,000	\$ 1,500,000	\$ -
Expenses	\$ 1,500,000	\$ 1,500,000	\$ -
Surplus/ (Deficit)	\$ -	\$ -	\$ -
% Spend	Closed- No surplus		

Money currently in reserve for Adv. Manufacturing as of 12/31/23
Interest

\$ 899,961
\$ 17,290
\$ 917,251

Active Grants:

DMCSP			
	Budget	Actual	Remaining Balance
Revenue	\$ 4,089,843	\$ 1,956,091	\$ 2,133,752
Expenses	\$ 4,089,843	\$ 2,432,991	\$ 1,656,852
Surplus/ (Deficit)	\$ -	\$ (476,900)	\$ 476,900
% Spend	59%		

EDA			
	Budget	Actual	Remaining Balance
Revenue	\$ 2,546,760	\$ 1,977,257	\$ 569,503
Expenses	\$ 2,546,760	\$ 2,117,097	\$ 429,662
Surplus/ (Deficit)	\$ -	\$ (139,841)	\$ 139,841
% Spend	83%		

Active Contracts:

ATDM 2.0			
	Budget	Actual	Remaining Balance
Revenue	\$ 18,094,566	\$ 18,094,566	\$ -
Expenses	\$ 18,094,566	\$ 13,990,235	\$ 4,104,331
Surplus/ (Deficit)	\$ -	\$ 4,104,331	\$ (4,104,331)
% Spend	77%		

ATDM 3.0			
	Budget	Actual	Remaining Balance
Revenue	\$ 21,241,922	\$ 12,256,783	\$ 8,985,139
Expenses	\$ 21,241,922	\$ 12,944,286	\$ 8,297,636
Surplus/ (Deficit)	\$ -	\$ (687,503)	\$ 687,503
% Spend	61%		

Afghan Ally #4			
	Budget	Actual	Remaining Balance
Revenue	\$ 36,872	\$ 36,872	\$ -
Expenses	\$ 36,872	\$ 28,876	\$ 7,996
Surplus/ (Deficit)	\$ -	\$ 7,996	\$ (7,996)
% Spend	78%		

Afghan Ally #5			
	Budget	Actual	Remaining Balance
Revenue	\$ 94,127	\$ 94,127	\$ -
Expenses	\$ 94,127	\$ 50,287	\$ 43,840
Surplus/ (Deficit)	\$ -	\$ 43,840	\$ (43,840)
% Spend	53%		

Austal - AMPRO SOW #1			
	Budget	Actual	Remaining Balance
Revenue	\$ 199,407	\$ 200,000	\$ (593)
Expenses	\$ 199,407	\$ 173,959	\$ 25,448
Surplus/ (Deficit)	\$ -	\$ 26,041	\$ (26,041)
% Spend	87%		

Austal - AMPRO SOW #2			
	Budget	Actual	Remaining Balance
Revenue	\$ 141,775	\$ 141,775	\$ -
Expenses	\$ 141,775	\$ 83,330	\$ 58,445
Surplus/ (Deficit)	\$ -	\$ 58,445	\$ (58,445)
% Spend	59%		

BFA - Submarine Transportation			
	Budget	Actual	Remaining Balance
Revenue	\$ 81,858	\$ 81,858	-
Expenses	\$ 81,858	\$ 73,467	\$ 8,391
Surplus/ (Deficit)	\$ -	\$ 8,391	\$ (8,391)
% Spend	90%		
May need to request additional funding to support the moving and set-			

BFA - RTC Long Lead			
	Budget	Actual	Remaining Balance
Revenue	\$ 19,215,000	\$ 15,597,773	\$ 3,617,227
Expenses	\$ 19,215,000	\$ 11,361,430	\$ 7,853,570
Surplus/ (Deficit)	\$ -	\$ 4,236,343	\$ (4,236,343)
% Spend	59%		

ATDM EB2 - Accenture & Personnel			
	Budget	Actual	Remaining Balance
Revenue	\$ 400,000	\$ 361,254	\$ 38,746
Expenses	\$ 400,000	\$ 391,374	\$ 8,626
Surplus/ (Deficit)	\$ -	\$ (30,120)	\$ 30,120
% Spend	98%		

Austal - AMPRO SOW #3 & Beyond			
	Budget	Actual	Remaining Balance
Revenue	\$ 3,609,504	\$ 2,517,079	\$ 1,092,425
Expenses	\$ 3,609,504	\$ 1,485,364	\$ 2,124,140
Surplus/ (Deficit)	\$ -	\$ 1,031,715	\$ (1,031,715)
% Spend	41%		

BFA - Mahmood Funding			
	Budget	Actual	Remaining Balance
Revenue	\$ 30,635	\$ 30,635	\$ -
Expenses	\$ 30,635	\$ 24,657	\$ 5,978
Surplus/ (Deficit)	\$ -	\$ 5,978	\$ (5,978)
% Spend	80%		

Afghan Ally #7			
	Budget	Actual	Remaining Balance
Revenue	\$ 79,853	\$ -	\$ 79,853
Expenses	\$ 79,853	\$ 316	\$ 79,536
Surplus/ (Deficit)	\$ -	\$ (316)	\$ 316
% Spend	0%		

DOD - RTC Funding			
	Budget	Actual	Remaining Balance
Revenue	\$ 37,758,000	\$ 10,935,637	\$ 26,822,363
Expenses	\$ 37,758,000	\$ 11,361,430	\$ 26,396,570
Surplus/ (Deficit)	\$ -	\$ (425,793)	\$ 425,793
% Spend	30%		
Phase 1 is underway, Funding for Phase 2 is in discussion			

Afghan Ally #6			
	Budget	Actual	Remaining Balance
Revenue	\$ 34,799	\$ -	\$ 34,799
Expenses	\$ 34,799	\$ 25,786	\$ 9,014
Surplus/ (Deficit)	\$ -	\$ (25,786)	\$ 25,786
% Spend	74%		

Project is expending as expected with no current concerns
Project is being watched for potential overages/ Issues
Project is experiencing potential large deviations from budget and immediate action is being taken



IALR Foundation

1. Statement of Net Position
2. Restricted Funds Report

Institute for Advanced Learning and Research

IALR Foundation Statement of Net Position

3/31/2023 vs 13/31/2024 Comparison

	3/31/23 IALRF Total	3/31/24 IALRF Total	Variance
Assets			
Current Assets:			
Unrestricted			
Cash and Cash Equivalents	\$873,383	\$703,987	(\$169,396)
Accounts Receivable, net	\$72,981	(\$4,051)	(\$77,032)
Prepaid Expenses	\$2,607	\$2,607	\$0
Interfund	(\$317,566)	(\$161,471)	\$156,095
Total Unrestricted Current Assets:	\$631,405	\$541,072	(\$90,333)
Total Current Assets:	\$631,405	\$541,072	(\$90,333)
Noncurrent Assets:			
Certificate of Deposits	\$331,487	\$332,748	\$1,261
Investments	\$2,593,085	\$2,993,333	\$400,248
Fixed Assets Depreciable	\$4,398,467	\$4,880,025	\$481,558
Total Noncurrent Assets:	\$7,323,039	\$8,206,106	\$883,067
Total Assets	\$7,954,444	\$8,747,178	\$792,734
Liabilities and Net Position			
Current Liabilities:			
Accounts payable - Operations	\$1,047	\$0	(\$1,047)
Total Current Liabilities:	\$1,047	\$0	(\$1,047)
Net Position:			
Restricted	\$1,639,557	\$1,919,490	\$279,933
Unrestricted	\$6,313,840	\$6,827,687	\$513,847
Total Net Position:	\$7,953,397	\$8,747,178	\$793,781
Total Liabilities and Net Assets	\$7,954,444	\$8,747,178	\$792,734

Restricted Cash Foundation

Advanced Learning		
Mid - Atlantic Broadband Communitites	\$	2,391
Capstone		
Gene Haas Foundation	\$	114,439
MFG Host Funding	\$	17,500
AutoDesk	\$	25,000
SME Education Foundtion	\$	5,000
BWX Technologies	\$	4,000
Misc Program Donations	\$	300
Advanced Manufacturing		
NWI Draper Family Scholarship	\$	10,000
IALR Internal Restriction		
Internally Restricted Funds	\$	82,446
Restricted for Grants, Scholarships & Internal	\$	261,076
Restricted for HAAS Endowment	\$	1,658,414
<hr/>		
Total Restricted	\$	1,919,490
<hr/>		
Total Unrestricted Cash	\$	442,911
<hr/>		

Departmental Comparison

DRAFT as of 4.22.24

		Board Approved		For Board Approval			
Department	Dept Code	FY2024	%	FY2025	%	Difference	Comments
CMA Operations	55	\$ 1,806,323	42%	\$ 2,989,203	57%	\$ 1,182,880	\$343K Contingency built in
Adv. Manufacturing	55	\$ 1,739,979	41%	\$ 1,651,011	32%	\$ (88,968)	
Capstone	50	\$ 542,592	13%	\$ 384,649	7%	\$ (157,943)	
Rapid Launch Facility	55	\$ 167,388	4%	\$ 194,634	4%	\$ 27,246	
Total Expenses		\$ 4,256,282	100%	\$ 5,219,497	100%	\$ 963,215	
IALR Support		\$ 407,592	10%	\$ 512,882	10%		
Facility Rental		\$ 417,642	10%	\$ 512,477	10%		
DRF Funding		\$ 500,000	12%	\$ 500,000	10%		
Other Revenue Sources		\$ 2,931,048	69%	\$ 3,694,138	71%		
Total Revenue		\$ 4,256,282	100%	\$ 5,219,497	100%		

Key Budget Highlights:

1. 3% COLA adjustment included for all employees
2. Budgeted for expected increases in software & PM agreements
3. Estimated \$1.5M surplus after salary buyouts, remainig indirects & contingency

Institute for Advanced Learning and Research
Conflict of Interest Policy

Purpose

This policy shall affirm standards of conduct established to ensure that the members of the Institute for Advanced Learning and Research (IALR) Board of Trustees and IALR's employees avoid potential and actual conflicts of interest, as well as the perception of a conflict of interest. Nothing in this Policy shall limit the obligation of any IALR Board member or employee to comply with the provisions of the Virginia State and Local Government Conflict of Interest Act (§ 2.2-3100 et seq.).

Definitions

Confidential information shall mean information not obtainable from reviewing a public document or from making inquiry to a publicly available source of information.

Conflict or conflict of interest shall mean use by an IALR Board member or employee of the authority of his/her office or employment, or any confidential information received through his/her holding such office or employment, for the private pecuniary benefit of him/herself, a member of his/her immediate family or a business with which s/he or a member of his/her immediate family has a financial interest. The term does not include an action having a de minimis economic impact, or which affects to the same degree a class consisting of the general public or a subclass consisting of an industry, occupation or other group which includes the Board member or employee, a member of his/her immediate family or a business with which s/he or a member of his/her immediate family has a financial interest.

Apparent conflict of interest shall mean a situation in which a reasonable person would perceive that a decision-maker's (Board member or employee) judgment is likely to be compromised.

De minimis economic impact shall mean an economic consequence that has an insignificant effect.

Financial interest shall mean any financial benefit or liability accruing to an IALR Board member or employee from: (i) ownership of more than three percent (3%) of the total equity of a business; (ii) annual income from a business that exceeds, or may reasonably be anticipated to exceed, \$5,000, including salary, other compensation, fringe benefits, or benefits from the use of property, or any combination thereof; or (ii) personal liability incurred or assumed on behalf of a business if the liability exceeds three percent (3%) of the asset value of the business.

Honorarium shall mean payment made in recognition of published works, appearances, speeches and presentations, and which is not intended as consideration for the value of such services which are nonpublic occupational or professional in nature. The term does not include tokens presented or provided which are of de minimis economic impact.

Immediate family shall mean a parent, parent-in-law, spouse, child, spouse of a child, brother,

brother-in-law, sister, sister-in-law, or the domestic partner of a parent, child, brother or sister.

Business shall mean a corporation, partnership, sole proprietorship, firm, enterprise, franchise, association, trust or foundation, company, organization, or any other individual or entity carrying on a business or profession, whether or not for profit.

Business partner shall mean a person who, along with an IALR Board member or employee, plays a significant role in owning, managing, or creating a business in which both individuals have a financial interest.

Statement of Policy

Each employee and Board member shall be responsible to maintain standards of conduct that avoid conflicts of interest. The Board prohibits members of the Board and employees from engaging in conduct that constitutes a conflict of interest as outlined in this policy.

All Board members and employees shall be provided with a copy of this policy and acknowledge in writing that they have been made aware of it. Additional training shall be provided to designated individuals.

Disclosure of Financial Interests

No Board member shall be allowed to take the oath of office or enter or continue upon his/her duties, nor shall s/he receive compensation from public funds, unless s/he has filed a statement of financial and other interests as required by law.

Standards of Conduct *(This section specifically addresses requirements of 2 CFR § 200.318)*

IALR maintains the following standards of conduct covering conflicts of interest and governing the actions of its employees and Board members engaged in the selection, award and administration of contracts.

No employee or Board member may participate in the selection, award or administration of a contract supported by a federal award if s/he has a real or apparent conflict of interest as defined above, as well as any other circumstance in which the employee, Board member, any member of his/her immediate family, his/her business partner, or a business which employs or is about to employ any of them, has a financial or other interest in or a tangible personal benefit from a business considered for a contract.

IALR shall not enter into any contract with a Board member or employee, or his/her spouse or child, or any member of his/her immediate family who resides in the his/her household, or any business in which any of the foregoing have a financial interest, nor into in any contract in which any of the foregoing is a subcontractor, unless the Board has determined it is in IALR's best interests to do so, and the contract has been awarded through an open and public process that complies with the Virginia Public Procurement Act (§ 2.2-4300 et seq.), including prior public notice and subsequent public disclosure of all proposals considered and contracts awarded. In such

a case, the Board member or employee shall not have any supervisory or overall responsibility for the awarding, implementation or administration of the contract.

When advertised formal bidding is not required or used, an open and public process shall include at a minimum:

1. Public notice of the intent to contract for goods or services;
2. A reasonable amount of time for potential contractors to consider whether to offer quotes; and
3. Post-award public disclosure of who made bids or quotes and who was chosen.

Any Board member or employee who in the discharge of his/her official duties would be required to vote on a matter that would result in a conflict of interest shall abstain from voting and, prior to the vote being taken, publicly announce and disclose the nature of his/her interest as a public record.

No public official or public employee shall accept an honorarium.

Board members and employees may neither solicit nor accept gratuities, favors or anything of monetary value from contractors or parties to subcontracts, unless the gift is an unsolicited item of nominal value. Board members and employees may accept gifts of a nominal value in accordance with Board policy. For the purpose of this policy, nominal value is, in all cases, less than \$50.00.

Improper Influence

No person shall offer or give to a Board member, employee or nominee or candidate for the Board, or a member of his/her immediate family or a business with which s/he is associated, anything of monetary value, including a gift, loan, political contribution, reward or promise of future employment based on the offeror's or donor's understanding that the vote, official action or judgment of the Board member, employee or nominee or candidate for the Board would be influenced thereby.

No Board member, employee or nominee or candidate for the Board shall solicit or accept anything of monetary value, including a gift, loan, political contribution, reward or promise of future employment, based on any understanding of that Board member, employee or nominee or candidate that the vote, official action or judgment of the Board member, employee or nominee or candidate for the Board would be influenced thereby.

Organizational Conflicts *(This section specifically addresses requirements of 2 CFR §200.318)*

Organizational conflicts of interest may exist when due to IALR's relationship with a subsidiary, affiliated or parent organization that is a candidate for award of a contract in connection with federally funded activities, IALR may be unable or appear to be unable to be impartial in conducting a procurement action involving a related organization.

In the event of a potential organizational conflict, the potential conflict shall be reviewed by the Board Chair or President, or designee, to determine whether it is likely that IALR would be unable

or appear to be unable to be impartial in making the award. That determination will not disqualify the related organization; however, IALR shall take the following steps:

1. The organizational relationship shall be disclosed as part of any notices to potential contractors;
2. Any IALR employees or officials directly involved in the activities of the related organization are excluded from the selection and award process;
3. A competitive bid, quote or other basis of valuation is considered; and
4. The Board has determined that contracting with the related organization is in the best interests of the program involved.

Reporting

Any perceived conflict of interest of an employee that is detected or suspected by any Board member, other employee or third party shall be reported to the President/Chief Accounting Officer/Chief Financial Officer. If the President/Chief Accounting Officer/Chief Financial Officer is the subject of the perceived conflict of interest, the Board member, employee or third party shall report the incident to the Board Chair.

Any perceived conflict of interest of a Board member that is detected or suspected by any other Board member, employee or third party shall be reported to the Board Chair. If the Board Chair is the subject of the perceived conflict of interest, the Board member, employee or third party shall report the incident to the President/Chief Accounting Officer/Chief Financial Officer, who shall report the incident to IALR's counsel.

IALR shall not retaliate against any Board member, employee or third party who makes a good faith report of a perceived conflict of interest.

Investigation

Investigations based on reports of perceived violations of this policy shall comply with state and federal laws and regulations. Investigations shall be conducted and reviewed by disinterested representatives of IALR.

In the event an investigation determines that a violation of this policy has occurred, the violation shall be reported to the federal awarding agency in accordance with that agency's policies.

Disciplinary Actions

If an investigation results in a finding that the complaint is founded and constitutes a violation of this policy, IALR shall take prompt, corrective action to ensure that such conduct ceases and will not recur. IALR staff shall document the corrective action taken and, when not prohibited by law, inform the complainant.

Violations of this policy may result in disciplinary action up to and including removal, discharge, fines and possible imprisonment. Disciplinary actions shall be consistent with Board policies and procedures, IALR's personnel policies, and state and federal laws and regulations.

Policy effective date: **June 1, 2022**

Fiscal Year Ending: **June 30, 2024**

I, _____, have been made aware of IALR's Conflict of Interest
Policy on this _____ day of _____, _____.
Signature

If any known conflicts exist, please list below:

1. _____
2. _____
3. _____
4. _____



Institute Conference Center

Serving Excellence



Strategic Goal 1

- God's Pit Crew
- Jehovah's Witness Service
- 1 Dream One Team Gala
- ATDM Graduation
- Chamber of Commerce Annual Meeting
- DPS Training
- AsphIRE Events
- Danville City Schools
- Family Literacy Night
- Saber Healthcare Training
- Atlantic Union Bank

Metrics January-March

- Total ICC guests: 7748
- ICC revenue: \$231,135
- Comped revenue: \$69,115
- Café guests: 3995
- Café revenue: \$32,518.70
- ICC & cafe guests combined: 11743
- Total gross revenue: \$263,653.70

Current Action Being Undertaken by Staff

Client Contact

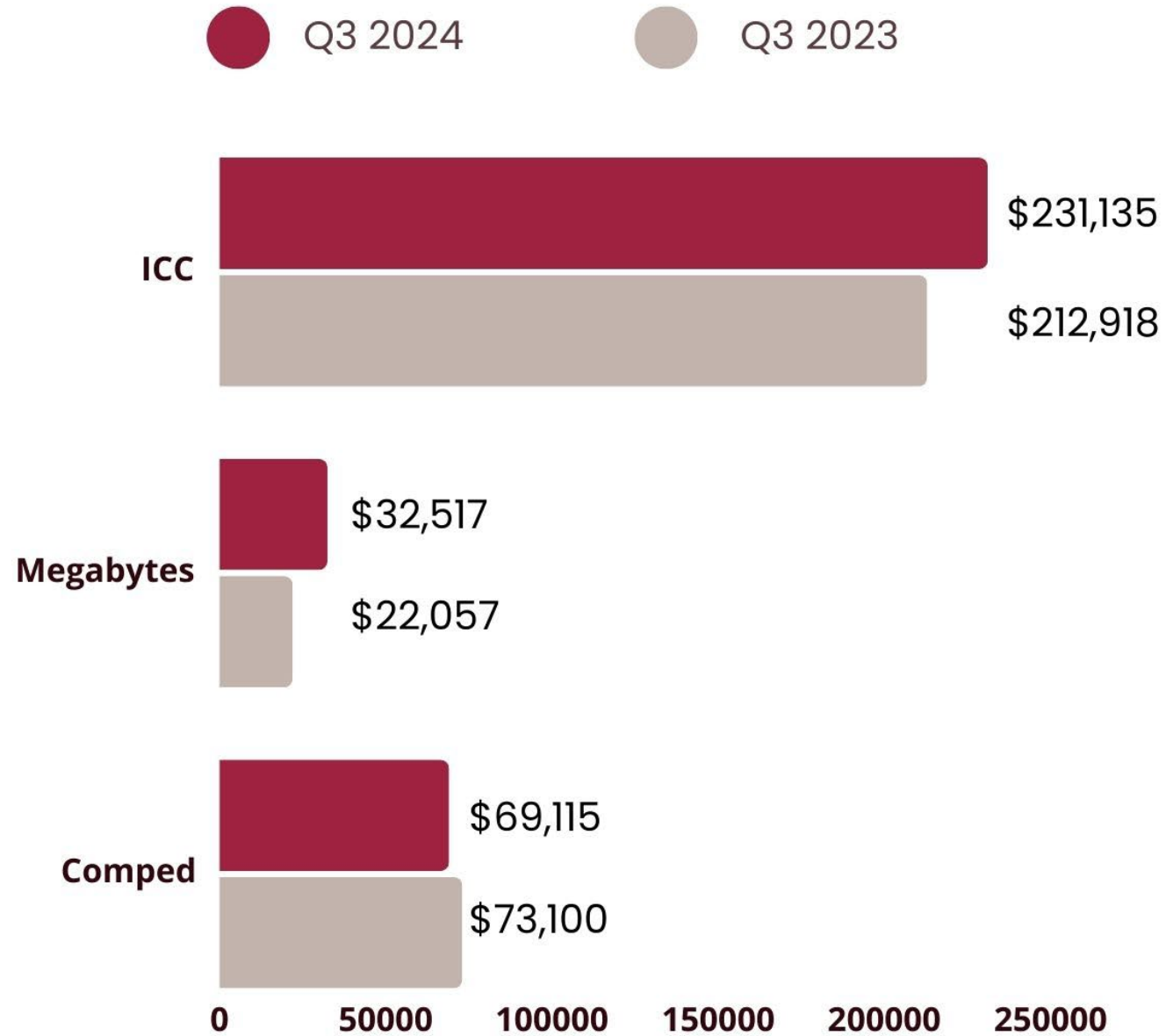
- In-person meetings
- Monthly visit w/ Manager of Tourism
- Quarterly meeting with VIR Resort Manager
- External phone calls
- Referrals from existing clients
- Ongoing daily support in executing events

Marketing

- Set up ICC specific social media accounts, eblasts
- Staff participation in Hospitality Management certification

Support/Decision Needed by Board

Continued support connecting ICC to regional businesses, industry and associations focused on attracting meetings and conferences



Q3 Sales

Strategic Goal 4

- Supported Family Literacy Night
- Initiated collaboration with Wonder Community to offer an Easter cooking class
- Collaborated with Communications team on ICC specific social media accounts

Metrics

150 guests attended

Event sold out with 10 participants
and a waiting list

Created ICC specific LinkedIn, Facebook and
Instagram accounts

Current Action Being Undertaken by Staff

- Created children-friendly dinner menu in Megabytes Café specifically for Family Literacy Night
- Coordinated menu and theme decorations for Easter cooking class
- Working with Communications team to provide informative social media posts

Support/Decision Needed by Board

None at this time



Manufacturing Advancement

Committee Report

May 2, 2024

Strategic Priority

Support and expand high-impact high-quality programs to meet demands of new and existing industry sectors

Accelerated Training in Defense Manufacturing (ATDM)
Naval Aviation Schoolhouse for Additive Manufacturing (NASAM)

Manufacturing Engineering Technology (MfgET)

Current Activity

ATDM

- 766 active applications; 7,235 active leads
- 85 new students started in March
- 15 new participating companies added
- 11 open positions; technical and administrative

NASAM

- Pilot cohort graduated on 3/29/24
- PMR successful; new cohort underway

MfgET

- IALR lecturer onsite

Metrics (ATDM Snapshot 5/2/24)

Current Cohorts	Total Graduates to Date	Current Enrollment	July Cohort Enrollment
#10 – Completes 6/11 #11 – Completes 8/6	470	189	108
Number of Instructors Across 3 Shifts	Number of Staff Members Dedicating 100% Effort to ATDM	Number of Staff Members Dedicating Partial Effort to ATDM	Participating SIB Companies
30/32	19	4	100+
Average Number Employers Participating in Job Fair	March Graduates Job Placement	Number of Unique States	RTC
15-20	Interviews 96% Offers 91% Accepted offers 89%	40 (+Australia, Puerto Rico, and Guam)	Construction Underway, Transition Plan 2024

Support Needed

- Continued connections/leads to industry
- Community champions for the program
- Attend/Participate in ATDM events

Looking Ahead

- In discussions on NASAM expansion with NAVSEA

Metrics (ATDM Snapshot 5/2/24)

Current Cohorts	Total Graduates to Date	Current Enrollment	July Cohort Enrollment
#10 – Completes 6/11 #11 – Completes 8/6	470	189	108
Number of Instructors Across 3 Shifts	Number of Staff Members Dedicating 100% Effort to ATDM	Number of Staff Members Dedicating Partial Effort to ATDM	Participating SIB Companies
30/32	19	4	100+
Average Number Employers Participating in Job Fair	March Graduates Job Placement	Number of Unique States	RTC
15-20	Interviews 96% Offers 91% Accepted offers 89%	40 (+Australia, Puerto Rico, and Guam)	Construction Underway, Transition Plan 2024

- In discussions on NASAM expansion with NAVSEA


NASAM Pilot Graduates



NASAM Pilot Cohort



ATDM- New Mentions




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TOPICS
PROJECTS
ABOUT US
EVENTS CALENDAR
OBITUARIES
CONNECT WITH US
MERCH STORE


Students come from around the world for workforce training in Danville. Getting them settled is a big job.

Danville's housing shortage makes hosting students in the Accelerated Training in Defense Manufacturing program a challenge. Here's how it gets done.



by Grace Mamon
April 12, 2024

TWITTER
FACEBOOK
LINKEDIN
EMAIL






HOME
CONTACT THE EDITOR
SIGN UP FOR EMAIL ALERTS
ABOUT TRENTONDAILY

Home
General Community
New Jersey Native Featured on Montel Williams Show




General Community


New Jersey Native Featured on Montel Williams Show



Celebrating one year of AUKUS
Learn More



THE MISSION
CAREER PATHS
SUPPLIERS
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NEWS

Giants of Skilled Trades: Dustin Frantz, ATDM Student

April 2, 2024

The path of Dustin Frantz's life has involved notable turns. He says his latest, which has led him to Danville, Virginia, is the one he is most excited about.

Frantz joined the U.S. Marine Corps in 2005 as a unit armorer. One of his four years in uniform was spent serving in the Iraq conflict, and it was in armory school that he first became interested in machining. Since his time in the military, he has owned a custom robotics company and has been a truck driver moving vehicle parts between the U.S. and Canada.

A major medical incident unfortunately led to Frantz losing his last job, his savings, and his house and property. While he was in recovery, a new path emerged via email: the **Accelerated Training in Defense Manufacturing**



Students come from around the world for workforce training in Danville. Getting them settled is a big job.

Danville's housing shortage makes hosting students in the Accelerated Training in Defense Manufacturing program a challenge. Here's how it gets done.



by **Grace Mamon**
April 12, 2024



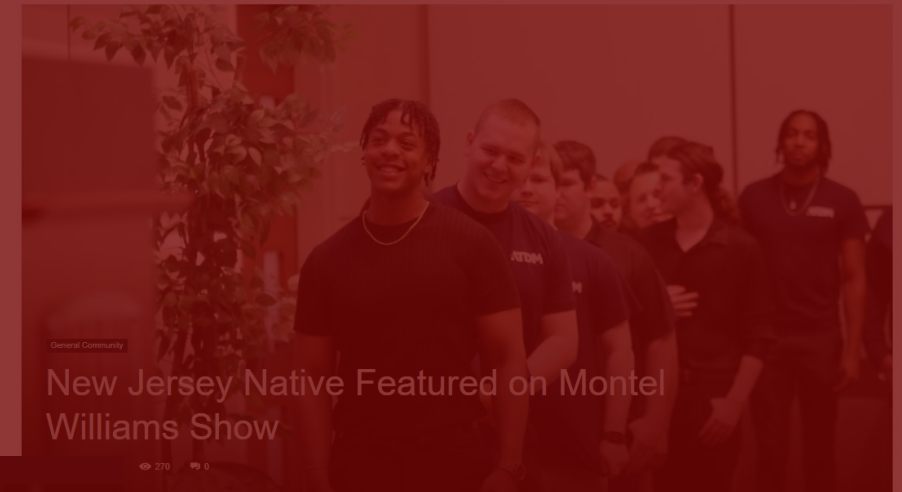
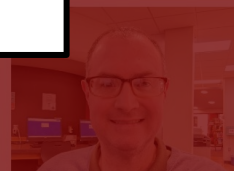
CARDINAL NEWS NOW HAS OBITUARIES



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A major medical incident unfortunately led to Frantz losing his last job, his savings, and his house and property. While he was in recovery, a new path emerged via email: the Accelerated Training in Defense Manufacturing

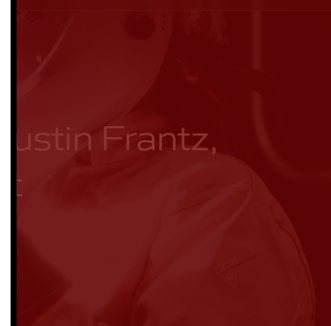


New Jersey Native Featured on Montel Williams Show

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Opportunities Newsroom EN ESP Get Com



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Military Makeover segment of the Montel Williams Show, Makhi Butler
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Students come from around the world for workforce training in Danville. Getting them settled is a big job.



Frantz joined the U.S. Marine Corps in 2001 as an armorer. One of his four years in uniform was spent serving in the Iraq conflict, and it was in army school that he first became interested in machining. Since his time in the military, he has owned a custom robotics company and has been a truck driver moving vehicle parts between the U.S. and Canada.




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General Community

New Jersey Native Featured on Montel Williams Show

February 11, 2024  270  0



Makhi Butler, a Trenton, NJ, resident and former U.S. Marine, has found a new career as a CNC machinist after attending Accelerated Training in Defense Manufacturing (ATDM).

Featured on the Military Makeover segment of the Montel Williams Show, Makhi Butler highlights his career pivot in Operation Career. Butler entered the United States Marine

Students come from around the world for workforce training in Danville Getting them settled is a big job

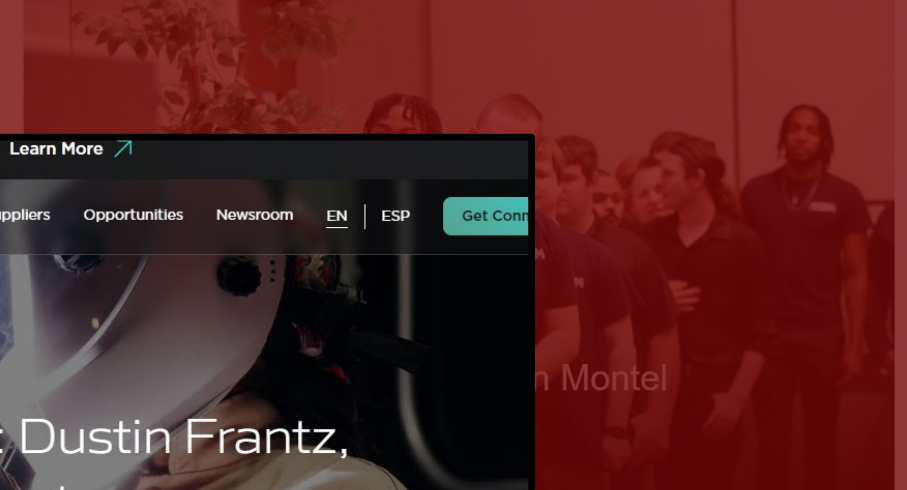
Danville's housing shortage makes hosting students in the Accelerated Training in Defense Manufacturing program a challenge.



by Grace Mamon
April 12, 2024



CAROL OBAMA



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Giants of Skilled Trades: Dustin Frantz, ATDM Student

April 2, 2024



The path of Dustin Frantz's life has involved notable turns. He says his latest, which has led him to Danville, Virginia, is the one he is most excited about.

Frantz joined the U.S. Marine Corps in 2005 as a unit armorer. One of his four years in uniform was spent serving in the Iraq conflict, and it was in armory school that he first became interested in machining. Since his time in the military, he has owned a custom robotics company and has been a truck driver moving vehicle parts between the U.S. and Canada.

A major medical incident unfortunately led to Frantz losing his last job, his savings, and his house and property. While he was in recovery, a new path emerged via email: the [Accelerated Training in Defense Manufacturing](#)



Strategic Priority

Invest in new leading-edge equipment, infrastructure, and related assets that will attract new businesses

**Center for Manufacturing Advancement (CMA)
Navy Additive Manufacturing Center of Excellence
Integrated Machining Technology (IMT)**

Current Activity

CMA

- Stage 1 ISO 9001:2015 audit scheduled for May
- Reached full capacity for IALR staff

AM COE

- 85 parts printed; 45 parts machined
- 45+ quick response parts in que
- \$40M+ funded to date

IMT

- 9th cohort graduated 3/29/24; 11 graduates

Metrics (Snapshot 5/2/24)

Months in CMA	Number of IALR FTE's	Number of IALR CNC Equipment Installed	Number of IALR Metrology Equipment Installed
13	10	11	10
Number of companies located in CMA	Total Number of FTEs in CMA	Navy Parts Printed in AMCOE	Number of TDP's created through AMCOE
3	18	85	62
Navy Parts Machined in AMCOE	Number of pieces of Industry 4.0 Equipment Installed	Industry 4.0 Integration Completed	Number of Students training at CMA
45	14	90%	75+

Support Needed

- Continued connections/leads to industry
- Community champions for the programs

Looking Ahead

- Seeking ISO 9001:2015 certification in 2024
- Implement staffing and equipment plans to support AMCOE ramp

Metrics (Snapshot 5/2/24)

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45	14	90%	75+

- Seeking ISO 9001:2015 certification in 2024
- Implement staffing and equipment plans to support AMCOE ramp

CMA: Year One Highlights

- 10 Full time employees onboarded (capacity); average salary \$88,000
- All equipment purchased and installed, over 40 unique pieces
- ISO Quality Management System written, approved, and implemented
- 1000+ Visitors
- All 5 bays are currently under lease
- CMA staff will be presenting at International Manufacturing Technology Show (IMTS)
- Optimization projects in progress (Los Alamos National Lab)
- Supported design/manufacturability of 114 Navy parts; machined and inspected 45
- Established strategic goals

AM COE: A Quick Response Resource

Problem: Supply chain issues, obsolete suppliers/parts, and workforce shortages continue to be a problem for The US Navy's readiness. This forces The US Navy to delay deployment or cannibalize other assets.

Solution: Use AMCOE as a quick response solution to get Navy assets, like ships and submarines, back to sea. Currently 45+ parts in quick response que.



Strategic Priority

Maintain strong collaborative relationships with the region's education centers, university partners, community colleges, and school divisions

Defense Manufacturing Community Support Program (DMCSP)

Integrated Machining Technology (IMT)

Haas Technical Education Community (HTEC) Training Center for Manufacturing Advancement (CMA)

Current Activity

DMCSP

- HCPS list finalized
- P&HCC and ODU curriculum complete
- America Makes on track towards deliverables

IMT

- 9th cohort graduated on 3/29

HTEC

- Specialized trainer role filled; training to resume in May

Metrics (Snapshot 5/2/24)

Students in 9 th and 10 th Grade Programs	Students in ODU Coursework	Number of Outreach Events	Students Impacted by GO TEC Expansion
335	494	393	8,153
Number Impacted by Outreach Efforts	HTEC Participants	IMT Students	IMT Curriculum
23,181	2024 Schedule finalized	11 graduated	New Automation Integration Underway

Support Needed

- None at this time

Looking Ahead

- Coordinating a visit with VA Secretary of Veterans and Defense Affairs to discuss next steps on May 8

Strategic

Maintain strong collaboration with the region's university partners and schools

Defense Manufacturing Center (DMCSP)
Integrated Machining Technology
Haas Technical Education Center for Manufacturing

Current

DMCSP

- HCPS list finalized
- P&HCC and ODU curriculum
- America Makes on track

IMT

- 9th cohort graduated

HTEC

- Specialized trainer recruitment

May

Metrics (Snapshot 5/2/24)			
Students in 9 th and 10 th Grade Programs	Students in ODU Coursework	Number of Outreach Events	Students Impacted by GO TEC Expansion
335	494	393	8,153
Number Impacted by Outreach Efforts	HTEC Participants	IMT Students	IMT Curriculum
23,181	2024 Schedule finalized	11 graduated	New Automation Integration Completed

Strategic Priority

Become the region's epicenter for training and educating a highly skilled workforce

Regional Training Center (RTC)

Integrated Machining Technology (IMT)

Accelerated Training in Defense Manufacturing (ATDM)

Naval Aviation Schoolhouse for Additive Manufacturing (NASAM)

Current Activity

RTC

- Construction remains on schedule
- Interior work well underway

CMA

- Supporting ITAR, CNC, and AM training for ATDM; solidifying ATDM-AMCOE integration
- Industry 4.0 team provided robotics training for IMT students; hosted additional educators for robotics course

Metrics



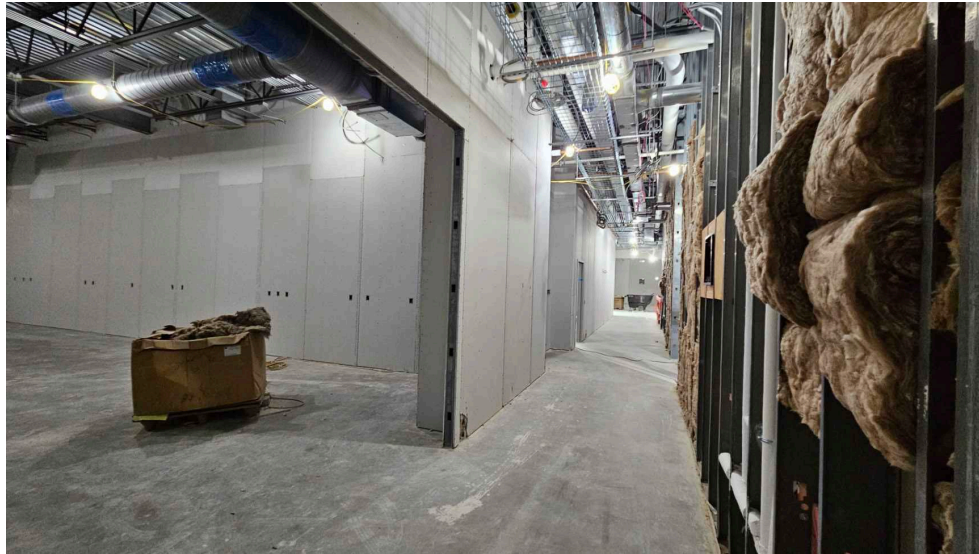
Support Needed

- None at this time

Looking Ahead

- Phase one completion of RTC anticipated Q4 2024
- NASAM pilot beginning February 20th

RTC Construction



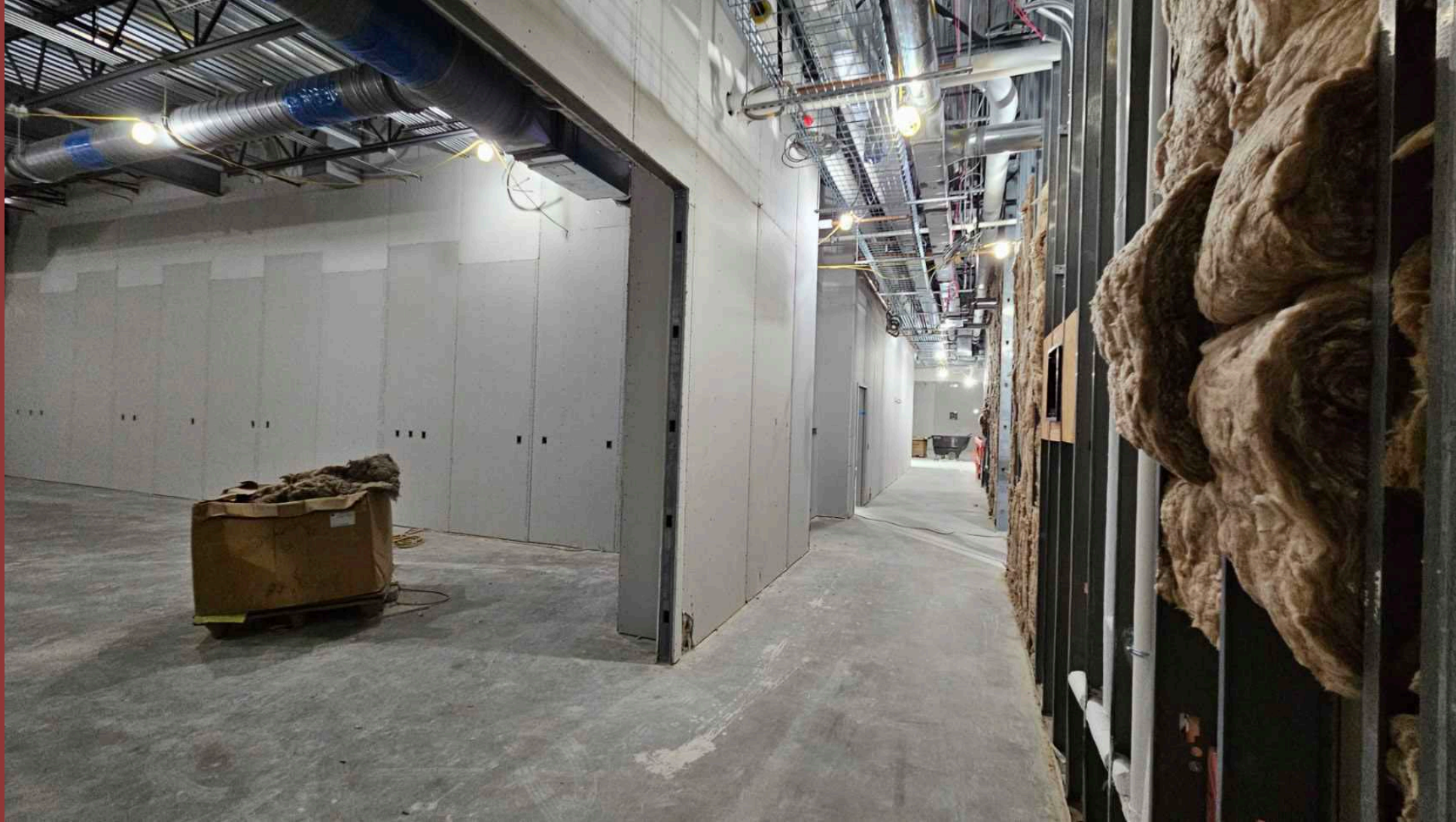
RTC Construction



RTC Construction



RTC Construction



RTC Construction



Strategic Priority

Drive cross-divisional collaboration and human capital investments to maximize IALR's impact

**GOTEC Collaboration
New Staff Hired
Grants and Contracts**

Current Activity

GOTEC Support

- MFG ADV staff completed Haas CNC certifications for GOTEC regional trainers

New Staff

- 9 new staff hired and onboarded
- 11 open positions

Metrics (Snapshot 5/2/24)

New ATDM Staff Hired	New CMA and IALR Staff Hired	Total Staff Hired
5	4	9
Current Open Positions	Total Manufacturing Advancement Staff	Current Active Grants & Contracts/Current Proposals in Progress
11	64	14/3

Support Needed

- None at this time

Looking Ahead

- Planning underway for GOTEC summer train-the-trainer courses

Metrics (Snapshot 5/2/24)

New ATDM Staff Hired	New CMA and IALR Staff Hired	Total Staff Hired
5	4	9
Current Open Positions	Total Manufacturing Advancement Staff	Current Active Grants & Contracts/Current Proposals in Progress
11	64	14/3

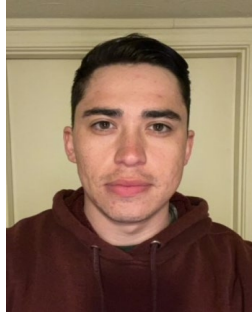
New Hires



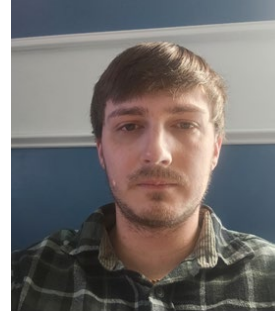
SHAWN DOLPH
Training Specialist



Austyn Roten
ATDM, Precision Mfg. Tech, 3rd Shift



Andrew Williams
Process Engineer, CMA



Tyler Gauldin
ATDM Precision Mfg. Tech, 2nd Shift



Andrew Anderson
ATDM Precision Mfg. Tech



Holly Lyle
ATDM, Metrology Technician



Ryan Benedetto
NASAM, Additive Technician



Colby King
ATDM Welding Technician



Darryl Murphy
CMA, CNC Machinist II

Q&A

Manufacturing Advancement Report
Amanda Hylton, VP Strategic Initiatives
Tim Robertson, COO
April 15, 2024

Personnel Updates:

- ATDM
 1. Austen Roten – Precision Manufacturing Technician
 2. Andrew Anderson – Precision Manufacturing Technician
 3. Colby King – Welding Technician
 4. Tyler Gauldin – Precision Manufacturing Technician
 5. Holly Lyle – Metrology Technician
- CMA
 1. Darryl Murphy – CNC Machinist II
 2. Andrew Williams – Process Engineer
- Manufacturing Advancement
 1. Shawn Dolph- Specialized Trainer
 2. Ryan Benedetto – NASAM Additive Manufacturing Technician
- Open Positions
 1. EVP, Manufacturing Advancement
 2. Administrative Support, Manufacturing Advancement
 3. ATDM Manufacturing Industry Representative
 4. ATDM NDT Instructor – 2 positions
 5. ATDM NDT Lab Technician
 6. ATDM Job Placement Coordinator
 7. ATDM Admissions Advisor
 8. ATDM Precision Manufacturing Technician
 9. ATDM Student Support Specialist
 10. ATDM Welding Instructor
 11. ATDM CNC Machining Instructor

Accelerated Training in Defense Manufacturing

- Budget and Contracting
 - ATDM 3.0 is underway with \$13.4M being invoiced to date of the full \$21.2M
 - \$14.1M expended to date
 - The RTC/NTC bid proposal for Phase II and value engineering has been completed, additional next steps are being completed to finalize the contract with ACC-RI (our contracting group)
 - Total funded to date is \$56.9M
 - A proposal for staffing and operations for the next 5 years for ATDM and the RTC/NTC has been submitted and we are awaiting a response from the lead on the proposal

- Tiger Teams
 - Tiger Teams have made significant improvements in processes for ATDM. These include: automation processes for recruitment, admissions portals for students to submit paperwork, data collection standardization, data analysis simplification, student experience survey enhancements, website redevelopment and improved functionality, and the development of a comprehensive marketing strategy to support scaling
- Staffing
 - Staffing requirements for the next phases of the proposal are being developed
 - Ways to streamline the hiring process to help support line of effort needs are being explored
- Recruitment
 - Automations and student admissions portals have greatly improved the ability of staff to respond to the number of leads and active applications
 - The team is attending on average two to three recruitment events per week
 - 773 active applications; 11,318 active leads/inquiries
- Training
 - 81 students graduated on February 2 from the 9th cohort
 - 59 Students graduated from the 10th cohort, which completed on March 29
 - The February cohort started with 104 students
 - The April cohort started with 85 students
- Industry Engagement
 - Additional processes being developed to support an increase in the number of participating companies
 - 50 new companies were engaged during this quarter
 - 67 students were placed in SIB/DIB jobs in November and December
 - ATDM staff has engaged with over 283 companies to date, with 112 sponsoring and/or recruiting candidates
 - The ATDM Career Fair was held in March
 - Ray Montgomery has been contracted to provide industry engagement support for the team, and to date, has helped to coordinate four association and coalition visits to connect with industry
 - The team is fielding increased requests for participation for industry as a result of these efforts
- Student Services
 - Held meet and greet for new students for each of the incoming cohorts
 - Coordinated housing for all new and incoming students, as well as exit interviews and inspections for all graduating students
 - Supported over 60 unique student service needs in addition to student transition support upon completion and engaged with 6 local community organizations

- Dedicated Training Facility
 - Construction remains on schedule
 - Work continues to complete the contract for the second phase of construction
- Other Highlights
 - The ATDM logo was featured on the hood of the #17 BuildSubmarines car at the Martinsville race. 10 staff were in attendance, along with 10 students who were invited to attend. The recruitment team, in partnership with Fairlead and the GO TEC staff, were represented in the FanZone
 - ATDM is working with BuildSubmarines to have a presence at additional races this year, including Charlotte in May, Richmond in August, and Martinsville again in November. We are also exploring ways to leverage their attendance at key events, as well as other announced partnerships including MLB.

NASAM Additive Manufacturing Training

- First cohort completed in March
- Second cohort underway
- Will train 96 sailors and marines every year with 12 students per cohort every 6 weeks at scale
- Through work with NAVAIR, an additional 2-week training option has been added for sailors that are unable to step away from current duties for full program duration.
- Work is ongoing to finalize funding to continue this training through FY25
- A similar program for active duty through NAVSEA is being explored
- NASAM hosted an open house on March 5 with NAVAIR leadership attending and touring the training and the CMA

Defense Manufacturing Community Support Program (DMCSP)

- Total student enrollments to date: 494 students in ODU coursework leading to MfgET degree; 185 in Danville Public Schools 9th and 10th grade programs; 150 in Pittsylvania County Schools 9th and 10th grade programs and welding; 8,153 impacted by GO TEC expansion efforts; 23,181 students and educators impacted by 393 outreach visits at VSU
- The Office of Veterans and Defense Affairs continues to work to coordinate a visit from the new federal program manager tentatively scheduled for May 8
- A whitepaper to outline next phases of the DMCSP grant and Defense Manufacturing Community designation renewal has been submitted to our state liaison in the Office of Veterans and Defense Affairs
- VSU hosted the First Chesapeake Robotics Championship as part of the DMCSP outreach efforts and hosted all the partners for the VMIBC for the event

- The MfgET 4-year curriculum is 100% complete and has been finalized for deployment
- The P&HCC curriculum is 100% complete and is an approved program for Fall 24

Center for Manufacturing Advancement: First Year Status Report

- 10 Full time IALR employees onboarded (capacity)
- All equipment purchased and installed; over 40 unique pieces
- ISO Quality Management System written, approved, and implemented
- 1000+ Visitors
- All 5 bays are currently under lease
- CMA staff invited to present at International Manufacturing Technology Show (IMTS)
- Optimization projects in progress (Los Alamos National Lab)
- Supported design/manufacturability of 114 Navy parts; machined and inspected 45
- Established strategic goals

Additive Manufacturing Center of Excellence (AM COE)

- IALR has processed 45 parts through the CNC Innovation Lab for the US Navy
- IALR have provided technical review for 114 AMCOE parts
- An additional 40 parts for the US Navy are in various stages of production
- AMCOE has an additional 40+ special request parts in que

Specialized Training

- Shawn Dolph has been selected as the Specialized Trainer
- The training schedule for the 2024 year has been finalized and registrations are open for the first training sessions in May
- Work with the Gene Haas Foundation has begun to develop courses for robotics integration into CNC machine instruction
- The team is working to submit a hybrid AM workshop for presentation at the HTEC Americas conference in July

Integrated Machining Technology

- Robotics & Automation integration with be supported in the CMA Industry 4.0 lab starting in March 2024. Butch Kendrick is leading this effort. This is a substantial step forward for the Integrated Machining Tehcnology Program
- IALR has worked closely with Melissa Mann (Dean of Workforce Services) and Dr. Johnson (VP of Academics) at DCC to give a historical perspective of the importance of the Integrated Machining Technology Program. A regular meeting cadence between IALR and DCC leadership has been established to ensure program alignment
- The 9th cohort of graduates completed the program in March. There were 12 completers

Key Highlights this Quarter

- 19 companies participated in the March ATDM Career Fair and 17 participated in the January Career Fair
- ATDM has supported five companies on site and visited nine companies this quarter

Contributions to the Strategic Plan

- **Accelerated Training in Defense Manufacturing**
 - Center of Excellence for Education & Workforce Development – ATDM is the pilot for a national network of accelerated training programs aimed at reducing “time-to-talent” for the defense industrial base (DIB) and filling critical skills gaps in defense manufacturing. As a national-in and national-out training platform, it partners with recruiting sources and industries nationwide
 - Globally Competitive Ecosystem – ATDM provides a robust level of industry engagement that allows industry to send students for training and place students in employment. As with previous models, such as Integrated Machining Technology, it has been shown that industry is interested in locating near training facilities to recruit workers at velocity and scale, which ATDM will produce. These trained individuals will support a workforce pipeline that will make the region more globally competitive
 - Collaborative Team Success – ATDM relies on external partnerships with recruitment sources, job placement entities, industry and technology partners. The multiple subcontractors involved in making the training a success provide opportunities to collaborate with other internal divisions
- **Defense Manufacturing Community Support Program**
 - Virginia's Go-To Partner for Business and Economic Growth – DMCSP supports the Virginia Maritime Industrial Base Consortium (VMIBC) as a leading hub for developing skilled workers and the engineering workforce for the maritime industry in Virginia; supports local, regional, state, and national economic development through the designation as a Defense Manufacturing Community (DMC) and the collaborative partnerships created through the VMIBC; IALR serves as the convener of partners to execute the DMCSP grant, providing the ability of IALR to be the go-to partner for the Virginia Department of Veterans and Defense Affairs in developing and enhancing workforce development pipelines that support Virginia's business and economic growth plans
 - Center of Excellence for Education & Workforce Development – DMCSP supports education & workforce development through the DMC ecosystem which provides a K-12 to university and beyond workforce training system. This includes career connections, high school, community college, university and adult learner options for training students to support the Virginia maritime industry. DMCSP

creates a pipeline for manufacturing engineering technologists and provides continuous improvement into training programs that rely on industry needs. The mission of the VMIBC (the designated DMC community) is to increase manufacturing capacity, capability, resiliency, and diversity in the maritime industrial base by creating a cross-region K-12 to university training pipeline for skilled workers and manufacturing engineers

- Globally Competitive Ecosystem – DMCSP advances and connects businesses in the region through a strong collaborative network of industry, government and academia. DMCSP will increase the supply of skilled labor and manufacturing engineers that will help to close manufacturing skills gaps, address manpower shortages, build manufacturing capacity and capability, and modernize the workforce to enable the industrial base to fully support the Navy's sustainment and shipbuilding needs. This will position the Commonwealth to be globally competitive in attracting manufacturing industries that are aligned to the skills within the pipeline
- Collaborative Team Success – DMCSP strengthens collaborative, regional education partnerships (ODU, P&HCC, Virginia State University and K-12 school divisions in Southern Virginia and Hampton Roads) and supports internal collaboration through the integration and expansion of GO TEC into the Hampton Roads region through the DMCSP partnership

- **Center for Manufacturing Advancement**

- Virginia's Go-To Partner for Business and Economic Growth – The CMA supports Virginia manufacturers in their pursuit of manufacturing optimization and innovation. The CMA offers technical expertise, lab space, equipment and a collaborative environment to help existing and new Virginia manufacturers increase productivity that has direct economic impact. The CMA serves as a centralized resource of emerging, production ready technologies to help drive the success of Virginia manufacturers. The US Navy AM Center of Excellence within the CMA is expected to support additional companies in their ability to produce AM parts for Navy submarines, including companies in Virginia
- Center of Excellence for Education & Workforce Development – Through efforts connected with ATDM, the CMA's AM COE will connect ATDM graduates with Additive Manufacturing (AM) jobs directly related to the Submarine Industrial Base (SIB). These connections will support the recruitment and placement efforts of ATDM. These connections will also support the US Navy and the SIB's effort to modernize the workforce and prepare for increasing AM production
- Globally Competitive Ecosystem – The CMA will allow businesses in Virginia to be globally competitive through innovations in current and new manufacturing processes. The AM COE at CMA will also support a globally competitive ecosystem through development of innovative additive manufacturing strategies, technical data and processes

- Collaborative Team Success - The CMA serves as the go-to hub for manufacturing advancement and innovation for Virginia businesses and beyond. The CMA will bring internal and external partners together to form a cohesive group of manufacturing experts, technical partners, business leaders and government officials. These partnerships and collaboration will drive the projects and programs at the CMA. The projects and programs will lead to positive return on investment for IALR and project partners. Revenue generated through CMA projects will help support the Manufacturing Advancement division as a whole and help provide the required resources to remain industry relevant and globally competitive
- **Specialized Training**
 - Virginia's Go-To Partner for Business and Economic Growth – As one of four HTEC training centers in the country, IALR serves as the Go-To teacher training facility for Virginia
 - Center of Excellence for Education & Workforce Development – The mission of HTEC is to provide a collaborative space in which we collectively develop, deliver, and disseminate the best educational methods and techniques for CNC education in the world. The goal is to drive the upskilling of manufacturing educators, and transform CNC classrooms into modern, high-tech advanced manufacturing labs that both encourage students to seek successful careers in CNC and related fields and ensure that these students are well-equipped when they enter the field. The goal of specialized training within the manufacturing advancement department is to be the Go-To training provider on CNC and related machine technologies, including the upcoming Industry 4.0 integrations within the CMA
 - Globally Competitive Ecosystem – As a partner for the HTEC network and Phillips Corporation, the training facility at IALR serves as a global benchmark as Haas expands into other countries and provides the potential to be a train-the-trainer provider for global Haas activity
- **Integrated Machining Technology**
 - Virginia's Go-To Partner for Business and Economic Growth – IMT has supported extensive business and economic growth in the region by highlighting the ability of the region to train a workforce that can meet demands at multiple levels, from the work floor technician to front line management and beyond. The IMT program is the advanced level training and culmination of the workforce pipeline that begins in middle school. It has been identified as one of the reasons that multiple companies have located in the region and has been the catalyst for allowing IALR to support these companies through rapid launch space and concierge services
 - Center of Excellence for Education & Workforce Development – The IMT program has been a national benchmark for advanced training in CNC machining for years and delegations from multiple states and countries

have visited to learn more about how to execute similar programs. The continuous improvement and adoption of current technology allows this program to support the strategic goal of being a center for excellence for education & workforce development

- Globally Competitive Ecosystem – Technology in manufacturing is rapidly evolving. Providing relevant training in support of industry needs is critical as technology and processes continue to modernize. It is a key factor in providing a globally competitive ecosystem. IMT supports this goal by remaining at the forefront of technology and training and ensuring that students can enter the workforce and provide innovative solutions to workforce challenges

- **Additional Contributions to the Strategic Plan**

- Excellence in Board Leadership - All projects strive for transparency with the Board by providing needs, successes and areas of support required that allow the board to serve as community champions, share successes and stories and support public and private funding support which promotes excellence in board leadership as the board carries out these strategic activities
- Strategic Expansion of Applied Research and Culture of Learning - The Manufacturing Advancement division encapsulates a culture of learning in all projects. It fosters innovation and encourages continued efforts to remain current on the knowledge of existing and emerging



Applied Research

Discovering Breakthroughs



Applied Research Board Report May 16th, 2024

1) Current employee metrics

IALR

Full Time – 6

Part Time – 1

To Be Hired – 2

VT

Full Time – 1

Part Time – 3

To Be Hired – 1

Graduate Students – 2 will be starting in the summer and fall

Companies Renting Space

Full Time - 3

Leases are Under Development with Two Additional Polymer Companies

2) Grants in preparation will result in an additional 3 full time employees

3) Growth

2019 there were 6 full time employees in the Research division

2024 there will be 10 full time employees and 4 part time employees

2025 there is potential for 3 more grant funded full time employees bringing total to 17

Highlights of 2024 IndoorAgCon (Las Vegas)



AgriTech ((()))
Tomorrow

Online Trade Magazine
Agricultural Technology and
Precision Farming

[Home](#) | [News](#) | [Indoor & Vertical Farming](#) | [Lighting](#) | [Precision Farming](#)

Indoor Ag Con 2024 Boosts Worldwide Attendance At Largest Event To Date

Sowing Innovation: Virginia's Vision for Controlled Environment Agriculture A Fireside Chat With Virginia Secretary of Agriculture Matthew Lohr

Join us for an engaging fireside chat as CropKing CEO Paul Brentlinger interviews Virginia Secretary of Agriculture Matthew Lohr about his state's leadership in the Controlled Environment Agriculture (CEA) sector. During the session Brentlinger and [read more...](#)



Moderator: Paul Brentlinger
CEO, CropKing



Matthew Lohr
Virginia Secretary of Agriculture and Forestry, Office of the Governor of Virginia

“During the session Brentlinger and Secretary Lohr will discuss Virginia’s substantial investments in research and development, innovative workforce training programs, and robust infrastructure to foster CEA industry growth. This session will give attendees valuable insights into Virginia’s strategic CEA plans, initiatives, support mechanisms and opportunities that exist for collaboration and innovation.”

Strategic Plan Alignment

Globally Competitive Business Ecosystem

Virginia's Go-to Partner for Business and Economic Growth

Actions Undertaken by Staff

Attended IndoorAgCon with Secretary Lohr and VEDP's Will Arney

Metrics

1 600 attendees from 49 States

287 booths

Met with 3 companies interested in locating in Virginia

Established 4 new partnerships

Promoted the 2024 CEA Summit East (October 1-2)

Applied Research Division Highlights for 1st Quarter 2024

- Canon Virginia agreement extended two years and expanded
- The CEA Center team toured Aerofarms
- Three new projects are underway with companies to co-develop IP
- Biomanufacturing workshop launched (July 29th – August 2nd)
- CEA Summit East advertising has initiated (October 1st-2nd)
- Three companies are interested in lab and office space
- Keynote Speaker for NASA's Plant the Moon Challenge
- Dr. Amaradasa recently published an article focused on bio-control of an important CEA related disease in the peer-reviewed journal PLOS One



Strategic Plan Alignment

Center of Excellence for Education and Workforce Development

Collaborative Team Success

Globally Competitive Ecosystem

Virginia's Go To Partner for Business and Economic Growth

Metrics

3 new IP Co-development Partners

3 Companies Interested in Space

1 Contract Extension

Actions Undertaken by Staff

Actively Recruiting More Partners

Advancing Virginia's Controlled Environment Agriculture Sector through Translational Research and Economic and Workforce Development

(Key Program Components)

Entrepreneur Support

- ✓ Expand CEA Innovation Center Support for companies
- ✓ Provide better access to space, testing, and expertise
- ✓ Partner with Cooperative Extension statewide to recruit startups
- ✓ Coordinate with existing entrepreneur ecosystems

Workforce Development

- ✓ Partner with Virginia Future Farmers to develop, implement, and manage an experiential learning program for middle and high school students, including the award of a CEA related **credentials** approved by the Virginia Department of Education
- ✓ Partner with Virginia Western Community College to facilitate implementation of their newly funded NSF **credential**-based Associates Degree Program in CEA Technology
- ✓ Partner with Virginia Tech for undergraduate, graduate, post-graduate, and adult learners for **VT backed badges, certificates, and advanced certificates** in industry driven topics.

Strategic Plan Alignment

Collaborative Team Success

Globally Competitive Business Ecosystem

Virginia's Go to Partner for Economic Development

Actions Undertaken by Staff

Developing implementation grant with Region 3, VT, and other partners

Metrics

Four key programmatic partners identified



“Advancing Virginia’s Controlled Environment Agriculture Sector through Translational Research and Economic and Workforce Development”

Other Activities Associated with the Implementation Grant

- CEA Target Market Assessment and Strategic Implementation Plan for Business Recruitment, Retention, and Expansion Programs
- CEA Business Ready Sites, Buildings Inventory, and Prototype Strategy
- VT/IALR Innovation Center Expansion for Increased Industry Support
- Enterprise Sustainability Plan

Key Funding Partners



Strategic Plan Alignment

Collaborative Team Success

Globally Competitive Business Ecosystem

Virginia's Go to Partner for Economic Development

Actions Undertaken by Staff

Developing implementation grant with Region 3, VT, and other partners

Metrics

Five key funding partners identified





Research Committee Report

Dr. Scott Lowman

April 2024

Name of Program or Initiative: Building Virginia's Controlled Environment Agriculture (CEA) Industry Through Targeted Research, Workforce, and Economic Development Initiatives

Current Activities by the IALR/VT team

1) Research

a. Aerofarms Collaboration

- i. Has moved from research to targeted testing of diseases.
 1. We are receiving samples weekly now.
- ii. The team visited the facility to see it fully operational. Most research is taking place there now and several opportunities were identified. They are going to provide the CEA Center with a number of units for offsite testing.

b. Research Partnerships

- i. Seven new research partnerships have been established.
- ii. Canon Virginia expansion is complete.
- iii. Implemented a new herb growth improvement project with Virginia Tech in the Controlled Environment Agriculture Center
- iv. Two Virginia Tech part time student workers have been hired to support the Innovation Center.
- v. A VT PhD student will be starting in the fall, and another will start during winter break.
- vi. Met with Plenty and they will be visiting soon.

c. Meetings, Tours, and Events

- i. Dr Lowman attended or presented at the following meetings.
 1. Virginia Agriculture Development Office (VADO) in Richmond.
 2. The VT College of Agriculture Center for Advanced Innovation in Agriculture's (CAIA) Big Event. Only 4 other centers were invited to present.
 3. Served as keynote speaker for NASA's National Plant the Moon Challenge.
 4. The GoVa Region 3 January Council meeting.
 5. The GoVa RISE Collaborative meeting.
 6. Attended the 52nd Agribusiness Council Annual Legislative Banquet in Richmond, Virginia with Telly Tucker and Dr. Hughes.
 7. Attended the Virginia Tech Legislative Breakfast in Richmond, Virginia with Telly Tucker and Dr. Hughes.



8. Traveled to Las Vegas to IndoorAgCon. The Secretary of Ag and Forestry along with VEDP were also in attendance. We met with 3 companies interested in locating in Virginia.
- ii. IALR hosted the following tours.
 1. Hosted a GoVa Region 3 visit and tour with Bryan David and others.
 2. Hosted a VEDP visit and tour with Shirley Dodson and Jason Evranian.
 3. Applied Research hosted a tour with 75 Governor's School students
 4. Hosted a tour group from GENEDGE.

d. Grants/Funding

- i. One million dollars was again included in the State Budget for CEA expansion but was removed in the end.
- ii. **Received** - Tobacco Region Revitalization Commission (TRRC) grant titled "Building a Regional Food System Through the Creation of a Value Chain Coordinator" (\$104,452 request + \$100,000 external match)
- iii. **Received** - Tobacco Region Revitalization Commission grant in partnership with Virginia Tech titled "Supporting Controlled Environment Agriculture (CEA) Growth in Southern Virginia", (\$145,841 request + \$150,000 external match)
- iv. **Received** – USDA Specialty Crop Block Grant "Biostimulants to Improve Indoor Strawberry Production" (\$54,000)
- v. **Received** – USDA Specialty Crop Block Grant "Biotechnology to Improve Indoor Strawberry Production and Disease Control"
- vi. **Received** - Agrospheres is funding a new employee for 2 years (\$110,000)
- vii. **Submitted** - The Applied Research team submitted a grant with the University of Georgia titled "The Use of Bacterial Endophytes to Improve Hydroponic Vegetable Production" (\$306,459)
- viii. **Submitted** – The applied research team along with Virginia Tech and Cornell University submitted a grant titled "Empowering Greenhouse Resiliency with an Optimized Workforce (E-GROW)" focused on introducing controlled environment agriculture to K-12. (\$149,119 sub-award)
- ix. **Submitted** - a Virginia Department of Agriculture and Consumer Services Grant focused on stress reduction in summer greenhouse vegetable production. The project is titled "A novel approach to improve heat stress tolerance in hydroponic greenhouse grown lettuce utilizing biostimulants" by Drs. Mei and Lowman. The funding amount is approximately \$60,000

2) CEA Economic Development

- a. GoVA report "Leveraging IALR and VT to Move the CEA Industry Forward" has been rolled out and is available upon request.



- b. Partnering with the Secretary of Agriculture and Forestry's office and Virginia Economic Development Partnership to solve real problems facing Virginia's CEA industry.
 - i. Worked with VEDP to highlight the CEA Innovation Center to two companies.
 - ii. Worked with the Secretary of Agriculture and Forestry's office to highlight the CEA Innovation Center to a company in Virginia.
- c. Met with Simon Chapman, VEDPs new employee focused on CEA and AgTech companies.

3) Other Items to Support the Above

- a. A SMART table has been installed at Hargrave Military Academy
- b. Applied Research hosted a visit from Bryan David, Program Director, Southern Virginia/GO Virginia Region 3. He and his team toured the labs and CEA center to highlight the various ways companies are supported.

Name of Program or Objective: AgTech and Life Sciences Manufacturing Support to Grow Industries Through Testing, Contract Research, and Lab Access

Current Activities

- 1) Bio-Manufacturing / Cell Factory / Bio-Foundry Initiative
 - a. The Summer Fermentation Workshop has been finalized and will be launched soon.
 - i. GoVa is also interested in exploring a biopharmaceutical manufacturing workforce development component.
 - ii. Multiple companies have expressed interest in participating including Novozymes, Agrospheres, and Bonumose.
 - iii. Partnership established with Virginia Western Community College.
 - 1. They received an NSF grant related to workforce training.
 - b. Analytical Chemistry is working with JTI to initiate testing.
 - c. Signed two new material transfer agreements with biotech companies related to biotechnology.
 - d. Work is underway with three new companies from Research Triangle Park to co-develop IP related to bio stimulants.
 - e. A new non-disclosure agreement has been signed with a venture capital funded startup focused on bio stimulants.
 - i. They are interested in lab and office space
- 2) Contract Research
 - a. Currently working with several new companies developing contract research projects.
 - b. Continue to do work for Plant Response.
 - c. Continue to support Agrosphere's growth.
 - i. Expansion of testing and greenhouse support for critical growth products.
 - ii. A second employee is now onsite part time.



- c. New BASF partnership established focused on biologicals and contract research – contract finalized and underway.
- d. New Syngenta partnership established focused on biologicals and contract research – contract finalized and underway.

3) Economic Development

- a. An agreement has been signed and a position has been filled for Agrospheres, a company Applied Research has supported over the last four years. The company is renting lab space and office space and will be covering the cost of a new technician for two years. This partnership is expected to grow more in the future, and they are also exploring licensing some of IALR's biostimulants.
- b. An agreement has been finalized with Plant Response, another company Applied Research has supported over the last four years. They will also be renting lab and office space in the Applied Research wing. They are also exploring licensing some of IALR's biostimulants.
- c. Worked with VEDP and a Mexico-based biotech company interested in lab and greenhouse space. They will be visiting soon.

Highlighted Project



Controlled Environment Agriculture Strategy and Roadmap in GO Virginia Region 3



Advancing Virginia's Controlled Environment Agriculture Sector through Translational Research and Economic and Workforce Development

Grant Elements and Partners

- **Entrepreneurship Support Program**

- promote agri-entrepreneurship across the CEA sector through the translational research at IALR related to production, controls, structures, sensors, data management, business principals, marketing, access to capital, etc.
- access to research space will be available for testing, and expertise in plant science will be available from various IALR and VT faculty
- join with an existing VT/IALR CEA Innovation Center partner, the Virginia Cooperative Extension, to develop, implement, and manage a pilot community-focused CEA-entrepreneur program for its offices in Region 3/Southern Virginia and elsewhere in the Commonwealth
- coordinate with the SOVA Rise Collaborative and other Virginia entrepreneur ecosystems as appropriate

- **Workforce Development Program**

- support coordination between K12 school divisions, higher education institutions, and CEA businesses using a talent pathway approach for curriculum, career exploration, and skill and credential acquisition
- partner with Virginia Future Farmers of America both in Region 3/Southern Virginia and elsewhere in the Commonwealth to develop, implement, and manage an experiential learning program for middle and high school students, including the award of a CEA-related credential approved by the Virginia Department of Education

- **CEA Residency Program**

- for post-graduate students to obtain knowledge and experience at the VT/IALR CEA Innovation Center
- accepted students will learn business principles and practices, interact with large and small CEA companies, and gain technical expertise. Upon program completion, these students will provide CEA companies with knowledgeable and skill-ready employees
- these students would be positioned to launch CEA start-up businesses based on the practical knowledge and industry contacts made during their residency.



- the overarching purpose of this program is to attract and retain highly skilled graduate-level CEA talent to support CEA business investment in Virginia
- program development, implementation, and management to be undertaken by VT/IALR CEA Innovation Center

- **CEA Target Market Assessment and Strategic Implementation Plan for Business Recruitment and Retention and Expansion Programs**

- increase CEA business investment and leverage the VT/IALR CEA Innovation Center as an industry-aligned asset for Region 3/Southern Virginia and the Commonwealth
- engage qualified subject matters experts to develop a CEA target market assessment and strategic implementation plan for use by the Region 3/Southern Virginia regional economic development organizations, the state's other regional economic development organizations, and state agencies with CEA-related economic and workforce development portfolios
- the CEA assessment and strategic plan will include existing and emerging trends in the CEA sector, sector challenges and opportunities, categorizing and topical information on existing domestic CEA companies and CEA supply chain companies
- the CEA assessment and strategic plan will include the potential for foreign domestic investment in Region 3/Southern Virginia and the Commonwealth, particularly from the European Union's established CEA sector and other emerging international CEA sectors
- coordination by VT/IALR CEA Innovation Center with support provided by Region 3/Southern Virginia regional economic development organizations (#3) and by invitation state's REDOs (#15), the Virginia Economic Development Partnership, the Department of Agriculture and Consumer Affairs, and other allied organizations

- **CEA Business Ready Sites and Buildings Inventory and Prototype Strategy**

- inventory, screen, and assess existing business sites and buildings in Region 3/Southern Virginia that may be suitable to support CEA business, both large and small-scale operations
- develop a model site and existing structure prototype for use by local economic and regional economic development organizations and entrepreneur support organizations in Region 3/Southern Virginia
- the inventory methodology and prototype strategy will be developed and laid out so that other economic development and entrepreneurial organizations can use and adapt the templates to local and regional conditions
- engage qualified subject matter experts to develop the sites and building inventory and prototype strategy



- coordination and support provided by IALR in conjunction with local economic development, regional economic development, and entrepreneur support organizations in Region 3/Southern Virginia

- **VT/IALR Innovation Center Expansion**

- to better position translational research and development services to meet industry growth and the evolving CEA marketplace aligned with industry needs and expectations
- expand the physical and programmatic space of the existing labs, offices, and greenhouses, including supporting structures, equipment, and site infrastructure
- coordination and support provided by VT/IALR CEA Innovation Center in conjunction with subject matter experts on the design, cost estimating, and construction of these specialized spaces as appropriate

- **VT/IALR CEA Innovation Center Measurement, Assessment, and Continuous Improvement**

- develop a framework, methodology, and reporting vehicle to ensure that overall project outcomes in the areas of workforce development, entrepreneurship, translational research, and economic development are measured, assessed, and refined to achieve optimal program performance
- coordination and support provided by VT/IALR CEA Innovation Center

- **Enterprise Sustainability Plan**

- develop, implement, and maintain a financial sustainability plan that supports the annual operation and capital needs of the VT/IALR CEA Innovation Center and the programs for workforce development, entrepreneurship, translational research, and economic development
- coordination and support provided by VT/IALR CEA Innovation Center



Advanced Learning Division

STRATEGIC GOAL: Center of Excellence for
Education & Workforce Development



Personnel Updates

- Hired three GO TEC Program Coordinators:
 - Bethany Meyers (Region 1)
 - Drew Jackson (Region 4)
 - Gwendolynn Malone (Region 5)
- Abby Karavanic hired as the GO TEC Program Assistant.
- Dr. Cassandra Shelton-Bowman resigned as the REACH Manager effective May 15, 2024.

As of May 1:

❖ AL FTE	19
❖ AmeriCorps members:	17
❖ Interns	0
❖ Contractual	0

Talent Pathways and Formal Learning



Current Activities:

- Significant time spent recruiting and onboarding new GO TEC team members.
- Training Coordinators earned their Haas Mill Operator Certification Test on February 8, 2024
- Meetings with UVA's Weldon Cooper Center (WCC) to finalize GO TEC logic model as part of the data mapping and evaluation plan.
- GO TEC VEX Robotics Competition was held at IALR on March 28, 2024. Eighteen teams from eight divisions participated in the event.
- Developing new energy curriculum as part of the Hampton Road Workforce Council/Navy subcontract.
- Industry and higher education meetings to support pharma manufacturing and CEA inclusion.



Metrics

Program	Target	Current
GO TEC VA 2025 (3yr)	3 new Training Labs 15 new teachers trained 3,400 jobs created/filled # in Career Connections	3 (100% completion) 19 New methodology TBD (23-24)



GOTEC® VEX Competition 2024

Great Opportunities in Technology and Engineering Careers



Talent Pathways and Formal Learning cont.

- AET students are currently working through the teamship model with problems presented by AL for the V-TOP effort to expand internships and FasTech. Jessie, Dana and John Hatchett (AET Engineering instructor) are facilitating.
- Received 44 IALR STEM Scholarship applications (no applications from Patrick or Martinsville). Sixteen \$1,000 awards will be presented. Thank you to Dana Silicki for coordinating the application process and to IALR employees for serving on the committee: Sherlina Thomas, John Smith, Joyce Culley (Manufacturing Adv); Jenni Gentry (Finance Dept); Allison Moore (PR & Comm)

Division	# Scholarships
Danville	2
Franklin	2
Halifax	3
Henry	3
Mecklenburg	2
Pittsylvania	4

AET Metrics	Danville	PCS
Applications SY24-25	31	68
Enrollment (4/26/2024)	8 (out of 9 slots)	16 (with waiting list)

Work-based Learning [WBL]

Current activities:

- Four AsPHIRE Mock Interview Day events, supporting 190 students.
- Partnering with Goodwill Industries of the Valley to handle summer high school intern timecard review and payment processing.
- In partnership with Franklin County, registered Virginia's first paramedic apprenticeship and registered 5 apprentices.
- IALR received the Silver Outstanding Intermediary Award from Virginia Works 6th Annual Outstanding Apprenticeship Awards.
- Worked with the Danville Lifesaving Crew and Danville Area Training Center to register nine new EMT apprentices (2nd cohort).
- Submitted \$2.2M grant to the DOL from a regional Apprenticeship Hub with employer incentives.
- Jessie Vernon and the CEO/Co-Founder of District C, Dan Gonzalez, provided a session on the Teamship model at the annual VACE (Virginia Association of Colleges and Employers) Conference.

Metrics

Program	Annual Target	YTD (Cum)
ExTRA	36 apprentices 12 credentials	60 apprentices NCCER; EMT cert (15)





AspHIRE
MOCKINTERVIEWDAY



Service & Lifelong Learning

REACH

- “See the Possible” Trip to Mountain Empire of Older Citizens to learn about their Medicare Transportation solution, accessing federal funds.
- Yanceyville, NC (Caswell), was added to the City Health Dashboard through the *Put Us on the Map* Challenge.
- Actively serving 638 clients.

AmeriCorps

- Hosted Family Literacy Night on March 14, 2024, with 150 attendees.
- PHA members led 25 workshops with 205 attendees.

Wonder Community

- Smart Seminar with DPC Chamber on using AI to support your small business (24 attendees); replicating series for MHC Chamber.
- Hosted card-making workshop at NCI.
- Easter Meal Sides workshop with ICC; sold out with 15 attendees.



Metrics

Member Recruitment & Placement (Jan. 15, 2024)		
	DRY AmeriCorps	REACH AmeriCorps
Budgeted Slots	37	15
Members Enrolled	20	13
Active Members	9	8

Family Literacy Night 3.14



Upcoming Events & Needs

- ❑ AET Completion Ceremony on May 10, 2024 at IALR.
- ❑ AL Team members attending the Virginia Volunteerism Summit May 15 – 16, 2024.
- ❑ Planning and support for Lead Virginia, Sorensen Institute and VRLI visits to the region/IALR.
- ❑ Scholarship Presentations
- ❑ Summer Camps (registration underway)
- ❑ IGNITE Internships (50 placements) and EXCITE Teacher Externships
- ❑ IALR interns start June 3rd / 10th
- ❑ AL Team supporting Danville Children's Festival June 15th



Above: IALR staff solar eclipse viewing party. Left: Allison Moore, Jacob Taylor and Jessica Hardy represent IALR at Project Literacy's Jeopardy!.

Advanced Learning (AL) Updates

May 2024

NEW GRANT AWARDS/CONTRACTS: Not applicable

PENDING GRANT APPLICATIONS/CONTRACTS:

1. In partnership with Brunswick County Public Schools, Henry County Public Schools and Patrick & Henry Community College, developed and submitted a GO Virginia per capita proposal for \$489,381 for GO TEC® Region 3 Expansion, Pathway Pilot and Welding Hub Development. GO Virginia Board to vote during their June meeting (no quorum in April).
2. Submitted a DOL ETA Apprenticeship Building America (ABA) Round 2 grant for \$2.2M to develop a regional Apprenticeship Hub. This four-year investment would support 2 staff, provide Employer Incentive Funds and support development of pre-apprenticeship programs in strategic sectors. Start date would be July 1, 2024.
3. Public Health AmeriCorps Year 3 grant submission of \$218,678.
4. Dan River Year AmeriCorps grant submission (*formula*) of \$226,963.

PERSONNEL UPDATES:

1. Bethany Meyers was hired as the Region 1 GO TEC Program Coordinator effective April 1, 2024.
2. Gwendolynn Malone was hired as the Region 5 GO TEC Program Coordinator effective April 1, 2024.
3. Drew Jackson was hired as the Region 4 Program Coordinator effective May 1, 2024.
4. Abby Karavanic was hired as the GO TEC Program Assistant effective May 1, 2024.
5. Dr. Cassandra Shelton-Bowman resigned as the REACH Manager effective May 15, 2024.

AMERCORPS:

Member Recruitment & Placement (2024)

	DRY AmeriCorps	REACH AmeriCorps
Budgeted Slots	37	15
Members Enrolled	20	13
Active Members	9	8
Completed Term	3	2

- Hosted Family Literacy Night on March 14, 2024, with 150 attendees. Hands-on activities provided by Dan River Year and Public Health AmeriCorps members, IALR, Joy of Reading, REACH, Literacy Lab, Danville Otterbots, Danville Project Literacy, URW, and Danville-Pittsylvania County United Way.
- Dan River Year AmeriCorps: recruitment continues for summer members; partnership meeting with Averett to engage education students.

- REACH Public Health AmeriCorps: PHA members led 13 community –based workshops with 99 attendees in February. PHA members provided 12 workshops with 106 attendees at various community locations in March.

GO TEC™ (Great Opportunities in Technology and Engineering Careers)

REGION 3 & Administrative

- All four GO TEC Training staff received their Haas Mill Operator Certification, with proctoring support from ATDM faculty.
- Region 3: Mobile lab to Halifax elementary schools (160 students) and Danville elementary school (8 students). Chris Griffith, new Region 3 Training Coordinator, visited most of the Region 3 middle school sites and provided tech support to multiple divisions on 3D Printers. Jake Taylor is working with Henry County Schools on the 9th and 10th grade pilot program to order equipment, supported through DMCSF funding.
- Held Region 3 GO TEC Advisory Council meetings. We will be adding Averett, Longwood and Hampden Sydney representatives to the Council along with remaining K12 GO TEC divisions and private sector employers.
- GO TEC Staff assisted Danville Public School with their Lego Robotics Tournament at Gibson Elementary on March 21st – 22nd.
- GO TEC mobile unit supported the Maker Faire at Culpepper Technical Center on March 9th, providing hands-on experiences to 160 attendees. Potential interest in adopting GO TEC model with visit from Culpepper stakeholders on April 23, 2024.
- Goodyear donated two tires for the GO TEC mobile unit.
- The 2nd Annual GO TEC Vex Competition was held on March 28th. We had 18 teams from eight K12 divisions attend.
- Dr. Julie Brown and Angela Rigney met with Carrie Roth and Nicole Overlay from Virginia Works (Department of Workforce Development and Advancement) to provide an overview and answer questions regarding GO TEC.
- Provided tech support and use of the Miller Welding Simulators for ATDM promotion, in partnership with Fairlead, at the Martinsville Speedway for the Nascar Cookout 400 race.

REGION 1 [Tim Kilbourne]

- Region 1: equipment installations in Dickenson, Norton, Bristol, Wythe and Washington. Supported co-teaching events in Carroll and Wythe.
- Held Region 1 GO TEC Advisory Council meeting.
- United Way of Southwest Virginia has transitioned many of its programs to a new nonprofit, EO; this new organization will serve as the In-Region Coordinating Entity (IRCE) with the same executive leadership.

REGION 4 [Evan Jones]

- Region 4: worked with Phillips Corp to troubleshoot technical glitches with the milling machine.
- Provided a tour to Surry County and hosted a visit from the John Randolph Foundation.
- Meetings and/or trainings with teachers and administrators: Surry, Dinwiddie, Richmond City, Colonial Heights, and Petersburg.

REGION 5 [Alecia Stancil]

- Region 5: Planning meetings with Maritime Training partners; provided classroom support to Suffolk and Portsmouth.

- MESA Planning meetings with Newport News Public Schools, ODU, Mariners Museum and VAMSC.
- STARBASE CHROME Club Support – Supported teachers with Robotics Clubs in Portsmouth Public Schools
- Marshall-Ridley Quarterly Partner Meeting – Collaborated w/ Industry and Community partners. NNPS, Brooks Crossing, and VPCC

EmPOWER: career exposure/engagement and Work-based Learning (WBL) system

AspHIRE:

Coordinated four AspHIRE events for GO Virginia Region 3. IALR hosted Pittsylvania and Danville students on March 5th and March 7th with 77 and 27 students (respectively). Thirty-two students from Amelia, Lunenburg, Nottoway, and Prince Edward attended the event at Longwood University on March 13th. On March 26th, 54 students from Brunswick, Charlotte, Halifax, and Mecklenburg attended the event at the Southern Virginia Higher Education Center (SVHEC). Total: 190 students.

Internships and VTOP:

Partnering with Goodwill Industries of the Valley to handle summer high school intern timecard review and payment processing.

Supported the District C Coaching Institute in partnership with SCHEV to expand the model to other regions. IALR implements the model as “Next generation of Work” [NoW]; AET students are currently working through the teamship model with problems presented by AL for the V-TOP effort to expand internships and FasTech.

Several Virginia Talent + Opportunity Partnership (V-TOP) meetings with the State Council of Higher Education for Virginia (SCHEV) (regional and 1:1) and summer internship planning meetings with Danville Public Schools.

Apprenticeship (ExTRA: Expanding Talent Through Registered Apprenticeship)

- In partnership with Franklin County, registered **Virginia’s first paramedic apprenticeship** and registered 5 apprentices.
- IALR received the Silver Outstanding Intermediary Award from Virginia Works 6th Annual Outstanding Apprenticeship Awards.
- Provided information and next steps for potential programs – Center for Early Success, DCC, P&HCC, Halifax Co./SVHEC, and IALR PR/Comm. Dept.; completed and submitted USDOL Apprenticeship Ambassador Application
- Assisted Keggereis Digital Marketing with registering two new apprenticeship occupations: User Experience Designer and Technical Sales Specialist.
- Worked with the Danville Lifesaving Crew and Danville Area Training Center to register nine new EMT apprentices (2nd cohort).

IALR STEM Scholarships

Received 44 IALR STEM Scholarship applications (no applications from Patrick or Martinsville). Based on committee decisions, IALR STEM Scholarship awards will be made to 16 students from the following divisions:

Danville: 2	Halifax: 3
Pittsylvania: 4	Henry: 3
Franklin: 2	Mecklenburg: 2

Thanks to Dana Silicki for her leadership on this effort and to our scholarship committee members - Sherlina Thomas, John Smith, Joyce Culley (Manufacturing Adv), Jenni Gentry (Finance Dept), Allison Moore (PR & Comm).

NCRC Testing/Work-Ready Communities

Continue to support NCRC testing for PATHS pre-employment. Tobacco Commission grant will end May 2024.

REACH Partnership

- REACH Partnership: Danville Life Saving Crew Community Paramedic and PHA Lead have been certified to offer Chronic Disease Self-Management workshops and partnered with Virginia Department of Health (VDH) to offer four sessions with 31 attendees. Actively serving 638 clients.
- REACH Partner, Yanceyville, NC (Caswell), was added to the City Health Dashboard through the *Put Us on the Map* Challenge.
- REACH podcast with IALR Communications team.
- REACH Partners, along with representatives from Pittsylvania County, DRF, and VDH, took a "See the Possible" Trip to Mountain Empire of Older Citizens to learn about their Medicare Transportation solution, accessing federal funds.
- IALR REACH staff toured Danville Pittsylvania Community Services' Crisis Intervention Center on April 19th and discussed opportunities to strengthen the partnership.

Wonder Community

- o February: provided two seminars on using OneDrive for Four Seasons Pest Control (8 attendees); provided a seminar on Outlook and Teams for Owens Illinois; Smart Seminar with DPC Chamber on using AI to support your small business (24 attendees); six additional workshops with 19 attendees.
- o March: coordinated six Wonder Community workshops. The Smart Seminar (Using AI) with DPC Chamber had 22 attendees. The Easter Meal Sides workshop, in partnership with IALR's Conference Center and Chef John, sold out with 15 attendees (several on the waiting list). Provided several 1:1 computer sessions, including a session for Four Seasons Pest Control employees. Hosted an off-site cardmaking workshop at New College Institute on March 23rd.

Camps/Outreach/Field Trips/Tours

- AL Team offered a St. Patrick's Day camp on March 15th at IALR for 13 students.
- AL and Applied Research provided an overview of current efforts and tour for the PGSMST students on March 27th.

AL TEAM DEVELOPMENT/PD/Community & Speaking Engagements/Stakeholder Meetings

1. AL team members continue to assist with ATDM interviews.
2. Supported visit and tour with Martinsville leaders on Feb. 15, 2024.
3. Supported SVRA prospect visit with AL overview and GO TEC tour.

4. Francina Jones, REACH Program Assistant, received her certification as a Tai Chi instructor.
5. AL team members set up an IALR display and networked at the Martinsville-Henry County Chamber's FastTrack event on March 5 – 6, 2024.
6. Provided tour and AL overview for several SVRA prospect visits.
7. AL Team members attended the Halifax Chamber Annual meeting on March 28th.
8. AL Team members attended SVRA's Workforce Solutions Summit on March 7th.
9. Dana Silicki attended a "See the Possible" visit to Greenville, SC with DRF's Out-of-School Time Collaborative.
10. Provided an overview of AL Programs and tour of the GO TEC lab for University of Virginia's new Weldon Cooper Center Executive Director, Dr. Eric Scorsone.
11. Provided an IALR Overview and tour for Virginia Economic Development Partnership (VEDP) staff, Shirley Dodson (Business Manager, Regional Talent Solutions) and Mike Evranian (Business Manager of Advanced Manufacturing), on March 20th.
12. AL Team hosted a Solar Eclipse All-staff Viewing Party on April 8th.
13. AL Team meeting on April 9th.

UPCOMING of INTEREST:

- AL AmeriCorps staff will attend the virtual Virginia Volunteerism Summit May 15 – 16, 2024.
- Lead Virginia visiting the southern Virginia region May 16 – 18th. IALR to host May 18th.
- Virginia Rural Leadership Institute at IALR on May 23rd.
- Mecklenburg County Scholarship presentation on May 22, 2024.
- GCAPS Robotics Camp June 3 – 6, 2024 in the GO TEC lab.
- AL Team supporting Children's Festival at the Carrington Pavilion on June 15th.