REGULAR EDA MEETING AGENDA

April 17 , 9:00 AM

A regular meeting of the Economic Development Authority (EDA) of Stafford County will be held in the George L. Gordon, Jr., Government Center, 1300 Courthouse Rd, Stafford, VA 22554.

1. CALL TO ORDER
    a. All members, contractors and staff shall state and disclose any real or perceived conflict of interest on any matter on the agenda.

2. ADD-ON ITEMS
    a. Slideshow for MWHC Bond Issuance for Item 10A

3. APPROVAL OF MINUTES
    a. March 20, 2026, Regular Meeting Minutes

4. TREASURER'S REPORT
    a. March Financials

5. PUBLIC PRESENTATIONS
    a. UMW Professor Dr. Rao- AI and Efficiencies in Economic Development & Business Practice
    b. Regional Military Affairs Council (MAC), Joe Caliri
    c. Stafford EDA Marketing & Events Report
    d. Stafford County Economic Development Report

6. SECRETARY'S REPORT

7. CHAIRMAN'S REPORT

8. COMMITTEE AND WORKING GROUP REPORTS
    a. Loan Committee (Jack R., Janette H. Staff support- Liz)
        i. Loan Report
        ii. Next Level Mosaic Updates
    b. Business Resources Committee (Daryl W., Dave B., Staff support- Savannah)
        i. Community-Based Organization (CBO) Grant Application(s):
            a. The Healing Station
    c. Research Committee (Marlon W., Jack R.)
    d. Technology Committee (Jeff R., Frank P.)

9. OLD BUSINESS
    a. Incentive Agreement Expense Agreement with County
    b. Strategic Plan Discussion
    c. Amendment to VABCC Grant (Previously Approved 02/20/26)

10. NEW BUSINESS
    a. Consideration of MWHC Bond Issuance
    b. Economic Development Summit
    c. Choose Charities for AJGA Golf Tournament

11. ATTORNEYS REPORT

12. CLOSED SESSION - Pursuant to Section 2.2- 3711 A 5 and 6 of the Code of Virginia 1950, as amended. The EDA intends to hold a closed session to discuss matters related to § 2.2-3711 A 5 and 6.

13. ADJOURNMENT - The next regular meeting is scheduled for May 15, 2026, at 9:00 AM in the George L. Gordon, Jr., Government Center, 1300 Courthouse Rd, Stafford, VA 22554.

3A

REGULAR MEETING MINUTES

The regular meeting of the Economic Development Authority (EDA), of Stafford County, Virginia, was held at the George L. Gordon Jr. Government Center, 1300 Courthouse Rd, Stafford VA 22554 on Friday, March 20, 2026.

1. **CALL TO ORDER**
   a. Mr. Rowley, Chair, called the meeting to order at 9:02 AM, emphasizing the necessity for all members and staff to declare any conflicts of interest with the agenda items. No conflicts were stated.

A quorum was present and accounted for.

Members

Jack Rowley, Chair
Marlon Wilson, Vice Chair
Jeff Roosa, Secretary
Frank Porcelli
Dave Burton
Daryl Weedeman
Janette Holland (absent)

ED/EDA Staff Present

Linzy Browne [virtual]
Jonathan Lindsley
Savannah Wimbush
Lauren Micklish
Shelley Kasten [virtual]
Charlie Payne, Esq.

Also Present

Meghann Cotter (Micah Ministries)

2. APPROVAL OF MINUTES

Mr. Rowley asked if anyone had any changes, additions or corrections to the February 20, 2026, minutes. There were no changes presented. Mr. Roosa made a motion to approve the minutes. Mr. Weedeman seconded. Motion passed unanimously. **APPROVED 6-0**

3. TREASURERS REPORT

a. February Financials: Ms. Kasten reported that February was a relatively normal month. The EDA had $146,903.58 total cash as of February 28. She highlighted that all loans were normal. Ms. Kasten noted that the LinkBank Operating Account balance shown was supposed to be as of February 28 rather than January 31.

   Mr. Rowley asked why Bridging Virginia was past due and showing on the aging report, and Ms. Kasten explained that a couple of check requests were missed when they were originally sent. She assured him that the issue had been resolved and Bridging Virginia was paid. She noted that she worked with Ms. Barber and Ms. Micklish to resolve the issue. Mr. Rowley asked about PB Mares bill being past due and Ms. Kasten explained that the bill was not sent until recently and the check request may have been missed originally as well. She reiterated that the bills have since been paid. Mr. Weedeman motioned to approve the February Financials. Mr. Burton seconded and the motion passed unanimously. **APPROVED 6-0**

4. PUBLIC COMMENTS

a. Stafford EDA Marketing & Events Report: Ms. Browne extended her thanks to the Award Selection Committee for the Business Appreciation Reception, noting that the Committee met to determine the winners earlier that week. She discussed that the awardees would be presented at the event on May 14, at the University of Mary Washington Stafford Campus, and emphasized that the awardees would remain confidential until then. Ms. Browne reported that all the top tier sponsors would be returning. She listed the top sponsors Stack Infrastructure, Hirschler, Germanna, and Matern Staffing. She noted that she is looking for a few more sponsors at the thousand-dollar tier and asked the members to send prospective sponsors her way. Ms. Browne emphasized the high registration number, at over 200 registrants, 55 days before the event. Mr. Roosa asked where to send potential sponsors. Ms. Browne clarified that a warm introductory email is preferred but there is also an online portal that sponsors could go through. She noted that she would resend the sponsorship information sheet to the members. Mr. Porcelli asked what the capacity for the venue would be and wondered if the event would be over capacity. Ms. Browne said that the capacity would be about 200 but assured the members that there was extra space if needed. She explained that the year prior, they had about 300 people register but only about 190

people came. Mr. Rowley commended the event and the registration response. Ms. Browne extended her thanks to Ms. Wimbush and the Economic Development Team for extending invitations out to local businesses.
Mr. Roosa mentioned inviting Amy Nearman, from Stafford County Public Schools. Mr. Rowley noted that Hunter Berry from the Schools should also be invited. Ms. Barber noted that if staff members were invited, the EDA should ensure that the Superintendent would be invited as well and asked that Ms. Wimbush invite Mr. Smith, Ms. Nearman, and Mr. Berry. Ms. Wimbush agreed to do so.

Ms. Browne moved on to discuss the upcoming Wine and Business event, to be hosted at Potomac Point Winery in May. She explained that she needed a new sponsor for the event due to the previous sponsor pulling out. She again asked that members send her any potential sponsors they are aware of. Mr. Burton asked for an estimate for the Wine and Business sponsorship and Ms. Browne said she would share the sponsorship information sheet with him.

Ms. Browne recommended that the EDA consider having their website updated to align with the Economic Development and Tourism Department's updated website. She encouraged the Board to use the same company the Department is using and volunteered to get a quote. Mr. Rowley asked what the timeframe for updating the website would be and Ms. Browne said that she would like to get started within the next six months. Mr. Rowley highlighted that the timeframe would allow the EDA to familiarize themselves with their role in the Department's Strategic Plan, avoiding the possibility of having to update the website twice. Ms. Browne agreed and noted that she would like the website update to be on their mind when discussing the Strategic Plan. Mr. Roosa asked if the Technology Committee would champion the website update. Mr. Rowley confirmed. Ms. Browne was thanked for her time.

b. Stafford County Economic Development Report: Ms. Barber reported that the Department's office would be under construction starting April 1 as the second phase of the county's Lobby Renovation commenced. She explained how the office would be set up, splitting the current office space between the Citizen's Assistance Office and the Economic Development and Tourism Office. Ms. Barber informed the group that construction would continue for about 6 to 8 weeks. She explained that the first floor Conference Room A would act as the Department's office during construction. She noted that Ms. Micklish would be there every day while other staff members would come in for the necessary scheduled meetings. She confirmed that the Department would conduct business as usual in their current office space until April 1.

Ms. Barber informed the EDA that she was invited to attend the Planning Commission Meeting held earlier that week. She explained the need for the Department to be a part of those discussions to move forward with their Strategic Plan. She discussed her satisfaction with the meeting, highlighting that she was able to align with the Commission on plans for the Target Development Areas. In the meeting, she discussed Economic Development's needs for additional lands with Industrial Zoning and Commercial Zoning as well for business recruitment purposes.

Ms. Barber mentioned that the Department hired a Tourism Program Manager who would be starting in April. She discussed the new Manager's background and emphasized how well aligned she was to work on the new Tourism Strategic Plan. Ms. Barber added that they had decided on the contractor to create the Tourism Strategic Plan.

Ms. Barber concluded by discussing the website update for the Department. She noted that the new website is between 3 to 6 months from launch. Mr. Rowley asked if updating the website was an internal decision. Ms. Barber confirmed, adding that the cosmetic changes would stay within the approved branding colors and fonts for Stafford County.

5. SECRETARY'S REPORT

Mr. Roosa stated that he had nothing to share.

6. CHAIRMAN'S REPORT

Mr. Rowley informed the EDA members that the Joint Meeting with the Board of Supervisors was rescheduled from May 8 to September 29. He explained the postponement of the meeting would allow for the EDA to begin work on the Strategic Plan and work on planning the Economic Development Summit before their meeting. Ms. Barber noted that she would follow up with a calendar invitation to the meeting for the staff and EDA members.

7. COMMITTEE AND WORKING GROUP REPORTS

a. Loan Committee (Jack R., Janette H. Staff support- Liz)
    i. Next Level Mosaic- Next Steps: Ms. Barber introduced the topic of Next Level Mosaic and let the members know that they were 4 months behind in their loan payments. Mr. Payne explained the security agreement that was attached to any personal property or equipment for the business. Mr. Rowley recalled that Next Level Mosaic had purchased some equipment but was unsure if it was installed or

used. Mr. Payne noted that if there were no assets in the business to collect from, the loan was also secured by two parties as individuals. Mr. Burton asked when the loan was approved and how many payments had been made by Next Level Mosaic. Ms. Barber reported that the loan was approved in July of 2023. She noted she was unsure how many payments they had made but, each payment had been difficult to get ahold of. Mr. Rowley mentioned that one of the owners had wealth but was having to use personal funds for the business. Mr. Porcelli motioned to move forward with legal action against Next Level Mosaic. Mr. Roosa seconded and the motion passed unanimously. **APPROVED 6-0**

ii. Consider Waiving Late Fees – Embrey Mill Urgent Care Loans: Ms. Barber explained that she received an email from Dr. Galam Khan asking for their late fees to be waived. She noted that he said the delay was due to an unknown issue with their bank. Mr. Roosa asked how much the late fees were. Ms. Barber explained that the late fees were around $250 between their two loans, emphasizing that they had already been given a 25-day grace period. Mr. Rowley pointed out that the grace period changed the date their payments were due because the Embrey Mill Urgent Care needed to wait to be paid by insurance providers. Mr. Weedeman asked if the EDA was incurring any fees due to their tardiness. Mr. Rowley confirmed that they were not. Ms. Barber highlighted that the request was the third of its kind from Embrey Mill Urgent Care over 2-3 years.

Mr. Burton asked what the reason for their tardiness was. Mr. Rowley noted that it was possible that the business was struggling. Ms. Barber reiterated the explanation provided in Dr. Khan's email. Mr. Wilson highlighted the high demand of the industry. Ms. Barber stated that she could not speak to the business' success. Mr. Weedeman confirmed with Ms. Barber that the business had two locations in the past but went back to having only one location. Mr. Burton asked how much was still owed to the EDA. Ms. Barber informed the group that their monthly payments were about $2,000 for their first loan and about $1,000 for their second loan. Mr. Roosa noted that the total amount still owed to the EDA was about $85,000. He considered that the offer of telehealth visits in the healthcare industry could have interfered with their business.

Mr. Burton said that since the EDA was not incurring fees, he was inclined to grant the request. Mr. Burton made a motion to waive the business' late fees. Mr. Roosa called for a point of order and suggested that rather than waiving the late fees, they should be added to the end of their loans. Mr. Payne explained that Mr. Roosa's suggestion should be considered an amendment to the original motion that must be accepted by Mr. Burton or it would be considered a separate motion that would be voted on first. Ms. Barber noted that the outcome of either of the motions would result in emailing Ms. Kasten and Bridging Virginia to put the motion into action. Mr. Porcelli asked how much time was left on the loan and suggested that the late fee be incurred if they fall behind again. Ms. Barber provided the maturity dates for Embrey Mill Urgent Care's loans. The maturity date for their first loan was July 1, 2027 and for the second loan it was December 1, 2028. Mr. Porcelli suggested an amendment to Mr. Burton's motion. He suggested waving the late fee, but have it reinstated if Embrey Mill Urgent Care is tardy again, resulting in being charged the previously waived late fees at the next occurrence. Mr. Burton accepted Mr. Porcelli's amendment. Ms. Barber confirmed with Mr. Porcelli that if they were to fall behind again, the next late fee would include this late fee. Mr. Roosa seconded and the motion passed unanimously. **APPROVED 6-0**

b. Business Resources Committee (Daryl W., Staff support- Savannah)
   i. Change to When Community-Based Grant Application Presentations are Required/Requested by EDA: Mr. Weedeman asked for an overview of last meeting's discussion on the topic. Mr. Roosa provided an overview of the discussion, highlighting that the Business Resource Committee was created to decide the outcome of Community-Based Grant Applications to reduce the amount of time taken for presentations during EDA meetings. Mr. Weedeman suggested amending the process for presentations to keep them under 15 minutes. He also suggested having the presentation requested, scheduled, reviewed, and approved ahead of EDA meetings. He suggested having Mr. Payne look over the document he had created, listing his proposed changes.

      Mr. Roosa confirmed that the decision of whom presented, under Mr. Weedeman's guidelines, would be up to the Committee. Ms. Barber confirmed that under Mr. Weedeman's proposed process, the applicant would be able to request to present. Mr. Weedeman confirmed and offered that the Committee could also request an applicant to present. Ms. Barber asked if the applicant would present to the Committee or the whole EDA. Mr. Weedeman stated that the applicant would present to the full EDA.

      Mr. Roosa reiterated the original intent to have the Committee decide if an applicant should be granted their request or not. He considered that under Mr. Weedeman's guidelines, an applicant could present something different from their original request. Mr. Weedeman reassured Mr. Roosa that in the guidelines he wrote out, the presentation should be on topic and would be reviewed beforehand. Mr. Roosa suggested that an applicant could decide to go against the guidelines and present something other than what was agreed upon. Mr. Weedeman offered to rework his guidelines with the members' questions and comments in mind and bring them back to the group once they had been prepared. Mr. Rowley recalled Ms. Brunette saying that the EDA could have presentations on a case-by-case basis or have a base-line dollar amount for presentations. Mr. Burton clarified that the goal was to formalize the process rather than rewriting it entirely. Mr. Weedeman offered to send the document he put together to the members. Mr. Roosa considered the optics of the Committee bringing someone in to present because they could not decide an outcome. Mr. Weedeman reiterated that the presentation would have to be reviewed prior to the meeting and that the Committee's authority would not change. Mr. Roosa confirmed that the applicant would have to provide their visual presentation beforehand. Mr. Rowley noted that requests to present could be denied by the Committee. Ms. Barber and Ms. Wimbush asked that Mr. Weedeman and Mr. Burton work on the amendment, with Ms. Wimbush's oversight, and bring it to the Board when it is ready for formalized review.

ii. Community-Based Organization (CBO) Grant Applications:
   a. Micah Ministries: Mr. Weedeman said he was still interested in supporting the Jeremiah Project given that the effort would generate jobs in Stafford and likely support some of the County's businesses. He highlighted that growth is an important goal for Stafford and the request is for a fraction of the total cost of the project. He discussed the partnership between Fredericksburg and Stafford, noting that ultimately there would be positive impact on Stafford. Mr. Weedeman reiterated that he would like to support the project, even if it was with a reduced sum of money. Mr. Burton discussed the direct and indirect growth possibilities, stating that growth leads to an increase in homelessness. He agreed that the project would positively impact Stafford through business growth. Mr. Weedeman recommended that the EDA give a grant of $80,000 for the project. Mr. Rowley recused himself from the vote due to his conflict of interest however, said that the EDA's questions and Micah Ministries' answers were notable.

      Mr. Roosa emphasized that after reviewing the grant request and responses to questions, the request appeared to align more closely with a public welfare or housing policy initiative, rather than a traditional economic development investment. He stated historically, Economic Development Authority investments were evaluated based on measurable economic outcomes such as Job creation, Business attraction or retention, Commercial development, and Workforce expansion aligned to the County's targeted industries. He highlighted that the application did not provide a clear economic rationale with measurable results, and the proposal did not sufficiently demonstrate that alignment with the mission of the Stafford County

Economic Development Authority. To his point, Mr. Roosa noted that the application did not identify any Stafford County corporate sponsors, local employer partnerships, workforce training agreements, or construction procurement commitments involving Stafford businesses. He mentioned that he would be more inclined to support the effort if there was evidence of stronger economic development alignment which might include employer letters of support, internship or hiring commitments, workforce training MOUs, or coordination with the County's Economic Development Department on procurement and private sector partnerships. Mr. Weedeman admitted the application was not very focused on economic development. Mr. Roosa agreed that the social/humanitarian effort was aligned with Mr. Weedeman's views. However, he emphasized due to the lack of clear alignment with the County's Strategic Plan 2040 and the mission of the Stafford County Economic Development Authority, he did not see alignment.

Mr. Weedeman argued that the opportunity to support this project was different than others due to the social impact it could have. He agreed that there was not much standing for economic development but noted that he would still like to support the project. Mr. Burton argued that the project would support the goal of making Stafford a favorable place to live. He said that the project would address public safety, support the veteran homeless population, and overall help to create a favorable environment for business growth. Mr. Wilson agreed that the project would positively impact Stafford businesses, highlighting that homelessness is often only addressed once the problem is too great. Ms. Barber noted that the Stafford County Board of Supervisors has contributed $55,000 to Micah Ministries for their cold weather shelters.

Mr. Roosa asked what the tax implication for Micah Ministries, in hopes to support the project through tax incentives as they have done in the past for Amazon or other businesses. Ms. Barber said that Micah Ministries would pay taxes to the locality they are in, Fredericksburg, so, there would be no tax incentives Stafford County could offer them.

Mr. Weedeman motioned to approve the grant with the amendment that the EDA would contribute $80,000 to the project rather than the requested $100,000. Mr. Burton seconded. The motion passed with one vote opposed from Mr. Roosa and with Mr. Rowley recused from the vote. **APPROVED 4-1**

iii. CBO Close Out Report(s):

a. Marketing Summit, Stafford County EDT: Ms. Barber pointed to the information provided in the Agenda Packet, highlighting the attendance, spending, and break-out session ratings for the Marketing Summit event. Mr. Rowley commended the report and the event. Ms. Barber thanked the EDA for their financial support of the event.

c. Research Committee (Marlon W., Jack R.): Mr. Rowley noted his intention to discuss the EDA's role in the Economic Development Strategic Plan later. He began discussing the Economic Development Summit and confirmed it would be held in November. Mr. Rowley considered the details of the event, noting that Ms. Browne could look for a venue. He informed the group that himself, Ms. Barber, Mr. Wilson, and Ms. Browne would be meeting to discuss the Summit in greater detail on March 30. Mr. Rowley suggested himself and Mr. Wilson lead the effort in planning. He highlighted that there would be plenty of room for other committees to help with the strategic plan. Ms. Barber requested clarify that their meeting on March 30 would be about planning the Economic Development Summit rather than discussing the broader Strategic Plan. Mr. Rowley confirmed.

Mr. Burton asked what the metrics for success would be regarding the Summit. Mr. Rowley explained that he would like to see good attendance, with over 100 attendees, and positive feedback after the event. Ms. Barber suggested that attendance would not be an issue. Mr. Porcelli asked what day the event would be held. Mr. Rowley stated that the event would be held in early November but there was no concrete date yet. Mr. Roosa recommended creating two committees, one focused on planning the Economic Development Summit and one focused on the Strategic Plan. Mr. Wilson concurred.

d. Technology Committee (Jeff R., Frank P.): Mr. Porcelli recapped his and Mr. Roosa's meeting with Dr. Anand Rao, Director of the University of Mary Washington's AI program. They had discussed the program and shifted the conversation toward the impact of AI in Stafford County's workforce and businesses. Mr. Porcelli gave the EDA members an overview of the program, highlighting the free Introduction to AI course that taught students how to use AI effectively. He noted that they invited Dr. Rao to present to the EDA in the April meeting, with the potential for partnerships, internship opportunities, or hosting pitch competitions. He goes on to say that hosting or sponsoring these events could lead to business development. Mr. Roosa discussed his enthusiasm for hosting pitch competitions, highlighting the return on investment for Stafford's business climate would be great. He continued to say that a partnership with the AI Program at Mary Washington, the EDA, and the Economic Development Department would be needed to support a pitch competition event. He considered the possibility of inviting organizations that the EDA has worked with, such as the Fredericksburg Regional Alliance, to sponsor the event.

Mr. Roosa pointed out the opportunity to identify anchor employers with such an event. Mr. Weedeman asked if they had a general understanding of the anchor businesses in AI already present in Stafford County. Mr. Porcelli provided the example of hospitals using AI systems as a first step to diagnose a person's ailment at intake whereas a typical hospital would be overrun and inefficiently rely on forms and human review. Mr. Weedeman considered other industries with similar issues of inefficiency. Mr. Porcelli emphasized that AI will be used across most industries to increase efficiency.

Mr. Roosa asked if businesses bring issues they are having to the Economic Development Department and Ms. Barber confirmed. She went on to say that such pitch competitions were noted in the Strategic Plan under item 1.3.2, to market toward target industries such as Cyber Security and Information Technology. She explained that the task was delegated to Ms. Wimbush to champion, with the EDA offering support. She also noted that there may not be immediate action on the item due to it being set for a medium term, with a goal of 1-3 years. Ms. Barber suggested waiting to start on the item after the Economic Development Summit. Mr. Roosa framed the meeting with Dr. Rao as establishing the framework for collaboration in the future. Mr. Porcelli proposed a formal or informal agreement with Mary Washington be made when Dr. Rao presents to the EDA, noting that he would extend the invitation. Ms. Barber asked if the presentation could be more general rather than focused on pitch competitions. Mr. Porcelli and Mr. Roosa confirmed that the presentation would focus on capabilities and the program as a whole. They assured Ms. Barber that the pitch competition topic was only part of the larger conversation.

8. **<u>OLD BUSINESS</u>**
   a. Incentive Agreement Expense Agreement with County: Ms. Barber discussed item 1.2.8, from the Strategic Plan, the fee structure for the EDA to use when processing incentive applications. Mr. Rowley stated that the Board had looked over Ms. Brunette's report at the last meeting. He concluded that collecting fees would be nice however, they were so small that they would not make much of a difference. Ms. Barber noted that not everything in the Strategic Plan may be worth pursuing.

9. **<u>NEW BUSINESS</u>**
   a. Strategic Plan Discussion/Create Committee: Mr. Roosa asked Ms. Barber to go over expectations and provide an overview of the EDA's role; she agreed. Mr. Roosa asked Ms. Barber to define the time frame expectations. She explained that short term was considered 1 year, medium was 1-3 years, and long term was 3-5 years. Ms. Barber clarified that she would provide her thought process and the EDA's role for each item.

Ms. Barber discussed item 1.1.1 which would work toward creating ordinances to incentivize and aid in the growth of target industries. She highlighted that the goal was to get the incentives formalized by bringing a draft ordinance to County Administration to get it to the Chair of the Board of Supervisors. Ms. Barber noted that Mr. Lindsley would take charge of the item and the EDA's role would be to engage with the Board of Supervisors to ensure the members understand that the ordinances align with the Strategic Plan.

Mr. Rowley asked how other counties provide incentives. Ms. Barber stated that other counties provide incentives through ordinances and incentive packages. Mr. Roosa asked if the EDA's fee schedule would be a part of the incentive process. Ms. Barber explained that the fee schedule could certainly tie in with incentives and noted that item 1.2.8 discussed the fee schedule more. Mr. Roosa asked about the priority of item 1.1.1 and Ms. Barber explained that she determined a medium time frame because it would take some time to get it to the Board. She said the restaurant incentive would come first. She highlighted the timing of bringing a proposal for incentive programs to the Board would have to be right for it to go well.

Mr. Rowley asked if everyone knew what C-PACE loans were and explained that they were an incentive that was supported by counties. Ms. Barber explained further, noting that the loan acts as gap financing for reducing a building's carbon footprint. To support C-PACE loans, the County would need to have an ordinance to allow C-PACE financing. She said in the past, the Board had not supported such an ordinance, however, the current Board may favor it due to the difference in political makeup. Ms. Barber reiterated that due to there being no risk to the County, allowing C-PACE financing may be an option and if it were to go through, the Department could promote it to businesses considering Stafford. Mr. Rowley asked how Ms. Barber would like the EDA to support the item. Ms. Barber reiterated that the EDA's role would be to engage with the Board of Supervisors and encourage them to support the effort since it would support Stafford's economic development. She informed the members that she had already met with someone from PACE Virginia and got an overview of the project about 2 years ago. She said the next step would be to re-engage with the PACE team and have the Chair attend the meeting to hear about the program from them. Mr. Rowley suggested inviting Carrie Hallberg from Hirschler to attend as well because she had worked with the EDA in the past on incentives and was very helpful. He continued to say that she could be of assistance in determining pitfalls. Ms. Barber noted that the PACE team was very transparent in discussing the pitfalls of their projects. She reiterated that similarly to bonds, C-PACE financing would not have financial repercussions for the County, but political repercussions were always a possibility. Mr. Payne agreed and highlighted Ms. Hallberg's knowledge on the subject, noting that she had presented to the Board of

Supervisors in the past. Ms. Barber shared a successful example of hotels using the C-PACE loans to install products that lower the building's carbon footprint such as automatic lights or smart A/C systems. More importantly, it provides gap financing to make the project more financially viable.

Ms. Barber discussed item 1.2.1 which entailed researching abatements offered to Stafford's target sectors by competitors. She explained an example that an area in need of redevelopment could benefit from a tax deferment or tax abatement, providing a tax break on improvements made in the first 5-10 years rather than using an incentive program. She reiterated that this is conceptual and has not yet been fleshed out, but has been used as a tool in other communities as a best practice.

Ms. Barber explained that item 1.2.3 had to do with increasing the EDA's income by promoting the EDA's bonding power. She noted that the EDA is limited by what funding they can receive. Ms. Barber suggested supporting more large manufacturing projects and certain 501(c)3's due to the low risk and high reward bonds provide. Mr. Roosa asked how many manufacturing companies Stafford had and how the Department would go about attracting more of these businesses. Ms. Barber mentioned that she had an update for closed session about a manufacturing company coming into the area. She highlighted that as attraction efforts are increasing for the Department, marketing aspects are increasing and getting better reception. Mr. Rowley considered a previous project utilizing bonds that fell through. Ms. Barber noted that the business had a 5-year window to get their bond reaffirmed, highlighting the difference between that project and having a manufacturer coming into Stafford. She suggested having Mike Graff come back in and explain the basics of the bond process to the EDA. Mr. Rowley mentioned having an outline for future use would be beneficial. Ms. Barber explained that the backups, Ms. Lynch and Ms. Browne would be tasked with updating the website to reflect the new attraction efforts and work on marketing once the outcome was determined.

Mr. Rowley discussed treating wastewater to be used for data centers as a good example of a potential project to push item 1.2.3 forward. Ms. Barber noted that her understanding was that project had been completely funded through agreements with the data center end-user. Mr. Payne suggested a conversation with Utilities to discuss their plan to expand regarding wastewater treatment. Ms. Barber requested clarification from Mr. Payne to describe the difference between a municipal bond that the Couty gets and a bond the EDA could provide. Mr. Payne confirmed and explained that an EDA bond would support the developer whereas a municipal bond would be given to provide a county service.

The Board agreed to end the meeting around 11:30am and pick up where they left off in the Strategic Plan in the next meeting.

Ms. Barber explained that item 1.3.1 was about the pitch competitions which may tie in with item 1.3.2. She asked the Technology Committee to take the lead on those items and Mr. Porcelli and Mr. Roosa agreed.

Ms. Barber introduced item 2.2.2.c, which focuses on reducing permit application fees to start a business in Stafford. She explained her thought process, noting that her options were to go through County Administration or offset those fees with a program offered by the EDA. The current permitting fees had just been reviewed and updated, so the best avenue would be through the EDA. However, Ms. Barber noted that the item may not be a priority at the moment. Mr. Rowley highlighted that Stafford County did not have a BPOL tax. Ms. Barber suggested that it may be the development fees that prevent people from starting a business in Stafford rather than BPOL taxes, which tax a business after they have already made a profit. She explained that the item would coincide with item 2.3.1 which discusses offsetting some of the big barriers to entry for Stafford businesses. Ms. Barber offered the example of the change of use of a building often coming with unexpected costs and long timelines. Mr. Weedeman noted that in his experience, Stafford's processes are longer and harder than those of surrounding counties. Mr. Rowley suggested that all counties face that issue. Mr. Weedeman agreed but highlighted the difficulty people have had creating businesses in Stafford. Ms. Barber added that the topic was also relevant to item 3.1.1, creating a "Doing Business in Stafford" Taskforce to make processes easier on our business. She noted that it was an internal goal that the Department would be working toward with the help of county administration.

10. ATTORNEY'S REPORT

Mr. Payne did not have anything to report.

11. CLOSED SESSION

Mr. Roosa motioned to go into closed session. Mr. Wilson seconded and the motion passed unanimously. **APPROVED 6-0**

Mr. Payne, representing EDA legal counsel, read into executive session, pursuant to Section 2.2-3711(A), subsection 5, as amended. All members who were present at the meeting were present at the executive session. As the Board came out of executive session, each member certified that no votes were taken while in executive session. Mr. Roosa made a motion to come out of closed session. Mr. Porcelli seconded. Motion passed unanimously. **APPROVED 6-0**

12. ADJOURNMENT

Mr. Roosa made a motion to adjourn the meeting, Mr. Burton seconded. The motion passed unanimously **APPROVED 6-0**

Meeting adjourned at 11:44 AM.

Respectfully submitted,

Jeff Roosa,

EDA Secretary

Page left intentionally blank.

4A

County of Stafford
Economic Development Authority

April 8, 2026

This cover letter for March 2026 Treasurer's Report is followed by the Statement of Activity (profit/loss) in three different formats, the Statement of Financial Position (balance sheet), the General Ledger and the transaction and monthly reconciliation reports for the checking accounts that had activity.

A summary of accounts is listed below:

	Balance as of February 28, 2026	Balance as of March 31, 2026
Total Cash	$146,903.58	$133,046.34
Total Investments – VA Mint	$977,344.70	$980,613.48
Total Long-Term Loans Owed to EDA	$4,067.22	$3,246.65
Total Micro Loans Owed to EDA	$270,959.63	$267,464.01
Total Assets	$1,402,935.50	$1,387,011.37
Total Liabilities	$17,706.50	$99,270.11

Notes: 1. LinkBank Operating Account (2143) balance as of March 31, 2026 - $23,553.42

Income & Expenses exceeding $500 are listed below:

Income outside of loans (cash basis)	Expenses (cash basis) paid in Jan
GCC - $2,000	Bridging Virginia $2,040.00
	Not Just Numbers $2,112.00
	Brolin $4,346.14
	Hirschler $1,967.00
Transfers within Cash Bank Accts	VA Alliance $12,500.00
	PB Mares $650.00

A/P Aging Detail Report

Economic Development Authority of Stafford County

As of Apr 8, 2026

DATE	TRANSACTION TYPE	NUM	VENDOR DISPLAY NAME	DUE DATE	PAST DUE	AMOUNT	OPEN BALANCE
CURRENT							
03/26/2026	Bill	20634	Micah Ecumenical Ministries	04/25/2026	-16	80,000.00	80,000.00
03/31/2026	Bill	544	Brolin Creative LLC	04/30/2026	-21	3,500.00	3,500.00
Total for CURRENT						**$83,500.00**	**$83,500.00**
TOTAL						**$83,500.00**	**$83,500.00**

EDA

General Ledger

March 2026

DATE	TRANSACTION TYPE	NUM	ADJ	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE
10100 Checking- Operating - Linkbank 2143								
Beginning Balance								37,658.57
03/04/2026	Deposit		No	Germanna Community College J/E		60050 Restricted Income:Business Appreciation sponsors	2,000.00	39,658.57
03/04/2026	Deposit		No	Bridging Virginia		-Split-	3,027.02	42,685.59
03/05/2026	Bill Payment (Check)	2322	No	Bridging Virginia		20000 Accounts Payable	-510.00	42,175.59
03/05/2026	Bill Payment (Check)	2323	No	Bridging Virginia		20000 Accounts Payable	-1,020.00	41,155.59
03/05/2026	Bill Payment (Check)	2325	No	PB Mares		20000 Accounts Payable	-650.00	40,505.59
03/06/2026	Bill Payment (Check)	2324	No	Virginia Alliance for Business, Commerce, and Communities Foundation		20000 Accounts Payable	-12,500.00	28,005.59
03/25/2026	Bill Payment (Check)	DD	No	Not Just Numbers Inc		20000 Accounts Payable	-1,059.50	26,946.09
03/26/2026	Bill Payment (Check)	DD	No	Brolin Creative LLC		20000 Accounts Payable	-4,346.14	22,599.95
03/30/2026	Bill Payment (Check)	2330	No	Hirschler Fleischer		20000 Accounts Payable	-1,967.00	20,632.95
03/30/2026	Bill Payment (Check)	2329	No	Bridging Virginia		20000 Accounts Payable	-510.00	20,122.95
03/31/2026	Bill Payment (Check)	DD	No	Not Just Numbers Inc		20000 Accounts Payable	-1,052.50	19,070.45
03/31/2026	Deposit		No	Bridging Virginia		-Split-	4,482.97	23,553.42
Total for 10100 Checking- Operating - Linkbank 2143							**$ -14,105.15**	
10102 Checking Testbed Linkbank 4016								
Beginning Balance								6,990.00
Total for 10102 Checking Testbed Linkbank 4016								
10103 Money Market Linkbank 0572								
Beginning Balance								17,900.81
03/31/2026	Deposit		No	Linkbank	INTEREST DEPOSIT	46400 Bank Interest	40.36	17,941.17
Total for 10103 Money Market Linkbank 0572							**$40.36**	
10104 Checking Municipal - Linkbank 0071								
Beginning Balance								84,354.20
03/31/2026	Deposit		No	Linkbank		46400 Bank Interest	207.55	84,561.75
Total for 10104 Checking Municipal - Linkbank 0071							**$207.55**	
11500 Other Accounts Receivable								
11500.02 Embry Mill 1								
Beginning Balance								2,101.25
03/01/2026	Journal Entry	NJNsk238	No		to record Mar 2026 loan payment	-Split-	2,101.25	4,202.50
03/04/2026	Deposit		No	Bridging Virginia		10100 Checking- Operating - Linkbank 2143	-2,001.19	2,201.31
03/31/2026	Deposit		No	Bridging Virginia		10100 Checking- Operating - Linkbank 2143	-2,001.19	200.12
Total for 11500.02 Embry Mill 1							**$ -1,901.13**	
11500.03 Embry Mill 2								
Beginning Balance								1,077.12
03/01/2026	Journal Entry	NJNsk239	No		to record Mar 26 loan payment	-Split-	1,077.12	2,154.24
03/04/2026	Deposit		No	Bridging Virginia		10100 Checking- Operating - Linkbank 2143	-1,025.83	1,128.41
03/31/2026	Deposit		No	Bridging Virginia		10100 Checking- Operating - Linkbank 2143	-1,025.83	102.58
Total for 11500.03 Embry Mill 2							**$ -974.54**	
11500.04 Ace Flight Solutions								
03/01/2026	Journal Entry	NJNsk240	No		to record Mar 26 loan payment	-Split-	875.52	875.52
03/31/2026	Deposit		No	Bridging Virginia		10100 Checking- Operating - Linkbank 2143	-833.83	41.69
Total for 11500.04 Ace Flight Solutions							**$41.69**	
11500.05 Columbus Cartopraphy								
03/01/2026	Journal Entry	NJNsk241	No		to record Mar 26 loan payment	-Split-	622.12	622.12
03/31/2026	Deposit		No	Bridging Virginia		10100 Checking- Operating - Linkbank 2143	-622.12	0.00
Total for 11500.05 Columbus Cartopraphy							**$0.00**	
11500.06 Next Level Mosaic								
03/26/2026	Journal Entry	NJNsk242	No		to record Mar 26 loan payment	-Split-	1,935.00	1,935.00
Total for 11500.06 Next Level Mosaic							**$1,935.00**	
Total for 11500 Other Accounts Receivable							**$ -898.98**	
124000 VA Mint Enhanced Cash Pool								
Beginning Balance								977,344.70
03/31/2026	Journal Entry	NJNsk243	No		to record dividend income for Mar 2026	-Split-	3,268.78	980,613.48
Total for 124000 VA Mint Enhanced Cash Pool							**$3,268.78**	
13000 Prepaid Expense								
Beginning Balance								482.00
03/01/2026	Journal Entry	NJNsk230	No			-Split-	-120.50	361.50
Total for 13000 Prepaid Expense							**$ -120.50**	
18000 Long Term Loan Rcvbs								
18200 Long Term Note - Ace Flight								
Beginning Balance								4,067.22
03/01/2026	Journal Entry	NJNsk240	No		to record Mar 26 loan payment	-Split-	-820.57	3,246.65
Total for 18200 Long Term Note - Ace Flight							**$ -820.57**	
Total for 18000 Long Term Loan Rcvbs							**$ -820.57**	
18900 VCC Bank Loans								
18904 Embrey Mill Primary Urgent Care								

EDA

General Ledger

March 2026

DATE	TRANSACTION TYPE	NUM	ADJ	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE
Beginning Balance								47,336.98
03/01/2026	Journal Entry	NJNsk238	No		to record Mar 2026 loan payment	-Split-	-1,867.82	45,469.16
Total for 18904 Embrey Mill Primary Urgent Care							**$ -1,867.82**	
18906 Columbus Cartography								
Beginning Balance								1,233.97
03/01/2026	Journal Entry	NJNsk241	No		to record Mar 26 loan payment	-Split-	-614.41	619.56
Total for 18906 Columbus Cartography							**$ -614.41**	
18907 Next Level Mosaic LLC								
Beginning Balance								142,250.55
03/26/2026	Journal Entry	NJNsk242	No		to record Mar 26 loan payment	-Split-	0.00	142,250.55
Total for 18907 Next Level Mosaic LLC							**$0.00**	
18908 Santana Holdings								
Beginning Balance								46,332.37
Total for 18908 Santana Holdings								
18909 Embrey Mill (2nd loan)								
Beginning Balance								33,629.24
03/01/2026	Journal Entry	NJNsk239	No		to record Mar 26 loan payment	-Split-	-836.87	32,792.37
Total for 18909 Embrey Mill (2nd loan)							**$ -836.87**	
Total for 18900 VCC Bank Loans							**$ -3,319.10**	
20000 Accounts Payable								
Beginning Balance								22,052.64
03/05/2026	Bill Payment (Check)	2323	No	Virginia Alliance for Business, Commerce, and Communities Foundation		-Split-	0.00	22,052.64
03/05/2026	Bill Payment (Check)	2323	No	Bridging Virginia		10100 Checking- Operating - Linkbank 2143	-1,020.00	21,032.64
03/05/2026	Bill Payment (Check)	2325	No	PB Mares		10100 Checking- Operating - Linkbank 2143	-650.00	20,382.64
03/05/2026	Bill Payment (Check)	2322	No	Bridging Virginia		10100 Checking- Operating - Linkbank 2143	-510.00	19,872.64
03/06/2026	Bill Payment (Check)	2324	No	Virginia Alliance for Business, Commerce, and Communities Foundation		10100 Checking- Operating - Linkbank 2143	-12,500.00	7,372.64
03/25/2026	Bill Payment (Check)	DD	No	Not Just Numbers Inc		10100 Checking- Operating - Linkbank 2143	-1,059.50	6,313.14
03/25/2026	Bill	6924	No	Not Just Numbers Inc	Mar 2026 MSP	-Split-	1,052.50	7,365.64
03/26/2026	Bill	20634	No	Micah Ecumenical Ministries		71000 Local Industry Support	80,000.00	87,365.64
03/26/2026	Bill Payment (Check)	DD	No	Brolin Creative LLC		10100 Checking- Operating - Linkbank 2143	-4,346.14	83,019.50
03/30/2026	Bill Payment (Check)	2330	No	Hirschler Fleischer		10100 Checking- Operating - Linkbank 2143	-1,967.00	81,052.50
03/30/2026	Bill Payment (Check)	2329	No	Bridging Virginia		10100 Checking- Operating - Linkbank 2143	-510.00	80,542.50
03/31/2026	Bill Payment (Check)	DD	No	Not Just Numbers Inc		10100 Checking- Operating - Linkbank 2143	-1,052.50	79,490.00
03/31/2026	Bill	544	No	Brolin Creative LLC	March 26: Consulting | Website Support | Social Media Management | Graphic Design | Media Management | Event Man/Supt: Beer & Business, Shop Small	73000 Marketing	3,500.00	82,990.00
03/31/2026	Bill	1453	No	Bridging Virginia	Monthly Admin Fee for March 2026 - Between five and twenty-five loans	69006 Fees & Charges:Loan Servicing Fees	510.00	83,500.00
Total for 20000 Accounts Payable							**$61,447.36**	
21000 Unearned Revenue								
Beginning Balance								15,770.11
Total for 21000 Unearned Revenue								
32000 Undesignated Fund Balance								
Beginning Balance								1,445,517.51
Total for 32000 Undesignated Fund Balance								
42000 Bond Issuance fees								
Beginning Balance								3,767.40
Total for 42000 Bond Issuance fees								
46400 Bank Interest								
Beginning Balance								20,536.69
03/31/2026	Journal Entry	NJNsk243	No		to record dividend income for Mar 2026	-Split-	3,268.78	23,805.47
03/31/2026	Deposit		No	Linkbank	INTEREST DEPOSIT	10103 Money Market Linkbank 0572	40.36	23,845.83
03/31/2026	Deposit		No	Linkbank		10104 Checking Municipal - Linkbank 0071	207.55	24,053.38
Total for 46400 Bank Interest							**$3,516.69**	
46500 Micro Loan Income								
46501 Micro Loan Interest Income								
Beginning Balance								11,957.00
03/01/2026	Journal Entry	NJNsk238	No		to record Mar 2026 loan payment	-Split-	133.37	12,090.37
03/01/2026	Journal Entry	NJNsk241	No		to record Mar 26 loan payment	-Split-	7.71	12,098.08
03/01/2026	Journal Entry	NJNsk240	No		to record Mar 26 loan payment	-Split-	13.26	12,111.34
03/01/2026	Journal Entry	NJNsk239	No		to record Mar 26 loan payment	-Split-	188.96	12,300.30
03/26/2026	Journal Entry	NJNsk242	No		to record Mar 26 loan payment	-Split-	1,935.00	14,235.30
Total for 46501 Micro Loan Interest Income							**$2,278.30**	
46502 Micro Loan Fees								
Beginning								588.22

EDA

General Ledger

March 2026

DATE	TRANSACTION TYPE	NUM	ADJ	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE
Balance								
03/01/2026	Journal Entry	NJNsk239	No		to record Mar 26 loan payment	-Split-	51.29	639.51
03/01/2026	Journal Entry	NJNsk240	No		to record Mar 26 loan payment	-Split-	41.69	681.20
03/01/2026	Journal Entry	NJNsk238	No		to record Mar 2026 loan payment	-Split-	100.06	781.26
Total for 46502 Micro Loan Fees							**$193.04**	
Total for 46500 Micro Loan Income							**$2,471.34**	
60000 Restricted Income								
60050 Business Appreciation sponsors								
Beginning Balance								7,917.00
03/04/2026	Deposit		No	Germanna Community College J/E	2026 BAR	10100 Checking- Operating - Linkbank 2143	2,000.00	9,917.00
Total for 60050 Business Appreciation sponsors							**$2,000.00**	
Total for 60000 Restricted Income							**$2,000.00**	
Channel selling fees								
Square fees								
Beginning Balance								41.29
Total for Square fees								
Total for Channel selling fees								
62000 Administration								
Beginning Balance								175.00
Total for 62000 Administration								
63100 Software Expense								
Beginning Balance								780.50
03/25/2026	Bill	6924	No	Not Just Numbers Inc	QBO Backup	20000 Accounts Payable	6.50	787.00
03/25/2026	Bill	6924	No	Not Just Numbers Inc	Contractor Payments Subscription	20000 Accounts Payable	10.50	797.50
03/25/2026	Bill	6924	No	Not Just Numbers Inc	QBO Subscription	20000 Accounts Payable	80.50	878.00
Total for 63100 Software Expense							**$97.50**	
63500 Insurance								
63501 General Insurance								
Beginning Balance								964.00
03/01/2026	Journal Entry	NJNsk230	No		to record monthly insurance expense allocation	-Split-	120.50	1,084.50
Total for 63501 General Insurance							**$120.50**	
Total for 63500 Insurance							**$120.50**	
64100 Donation								
Beginning Balance								2,000.00
Total for 64100 Donation								
65000 Legal Fees								
65004 General Retainer Matters								
Beginning Balance								16,806.86
Total for 65004 General Retainer Matters								
Total for 65000 Legal Fees								
66000 Accounting								
Beginning Balance								7,805.00
03/25/2026	Bill	6924	No	Not Just Numbers Inc	10hr Managed Service Package	20000 Accounts Payable	900.00	8,705.00
03/25/2026	Bill	6924	No	Not Just Numbers Inc	Monthly EDA Meeting	20000 Accounts Payable	55.00	8,760.00
Total for 66000 Accounting							**$955.00**	
66001 Audit (Annual Financial)								
Beginning Balance								15,300.00
Total for 66001 Audit (Annual Financial)								
69000 Fees & Charges								
69002 Bank Fee								
Beginning Balance								80.00
Total for 69002 Bank Fee								
69006 Loan Servicing Fees								
Beginning Balance								5,025.00
03/31/2026	Bill	1453	No	Bridging Virginia	March 2026	20000 Accounts Payable	510.00	5,535.00
Total for 69006 Loan Servicing Fees							**$510.00**	
Total for 69000 Fees & Charges							**$510.00**	
71000 Local Industry Support								
Beginning Balance								5,000.00
03/26/2026	Bill	20634	No	Micah Ecumenical Ministries	Jeremiah Community Pledge	20000 Accounts Payable	80,000.00	85,000.00
Total for 71000 Local Industry Support							**$80,000.00**	
71805 Bus Advocacy Empowerment Intitative								
Beginning Balance								12,500.00
Total for 71805 Bus Advocacy Empowerment Intitative								
73000 Marketing								
Beginning Balance								29,760.56
03/31/2026	Bill	544	No	Brolin Creative LLC	March 2025	20000 Accounts Payable	3,500.00	33,260.56
Total for 73000 Marketing							**$3,500.00**	
Not Specified								
03/05/2026	Bill Payment (Check)	2323	No	Virginia Alliance for Business, Commerce, and Communities Foundation	Voided	20000 Accounts Payable	0.00	0.00

EDA

General Ledger

March 2026

DATE	TRANSACTION TYPE	NUM	ADJ	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE
Total for Not Specified							**$0.00**	
73125 AJFA Sponsorship								
Beginning Balance								25,000.00
Total for 73125 AJFA Sponsorship								
74000 EDA Meetings/Meals								
Beginning Balance								1,363.97
Total for 74000 EDA Meetings/Meals								
80000 Restricted Expenses								
80025 Business Appreciation Event								
Beginning Balance								2,745.41
Total for 80025 Business Appreciation Event								
Total for 80000 Restricted Expenses								

SoA by Month Cal Yr

Economic Development Authority of Stafford County

January-March, 2026

	JAN 2026	FEB 2026	MAR 2026	TOTAL
Revenue				
42000 Bond Issuance fees	3,767.40			3,767.40
46400 Bank Interest	3,250.72	3,571.10	3,516.69	10,338.51
46500 Micro Loan Income				
46501 Micro Loan Interest Income	852.48	2,249.36	2,278.30	5,380.14
46502 Micro Loan Fees	0.00	151.35	193.04	344.39
Total for 46500 Micro Loan Income	**852.48**	**2,400.71**	**2,471.34**	**$5,724.53**
60000 Restricted Income				
60050 Business Appreciation sponsors		5,200.00	2,000.00	7,200.00
Total for 60000 Restricted Income		**5,200.00**	**2,000.00**	**$7,200.00**
Total for Revenue	**7,870.60**	**11,171.81**	**7,988.03**	**$27,030.44**
Gross Profit	**7,870.60**	**11,171.81**	**7,988.03**	**$27,030.44**
Expenditures				
63100 Software Expense	102.50	104.50	97.50	304.50
63500 Insurance				
63501 General Insurance	120.50	120.50	120.50	361.50
Total for 63500 Insurance	**120.50**	**120.50**	**120.50**	**$361.50**
65000 Legal Fees				
65004 General Retainer Matters	1,000.00	1,967.00		2,967.00
Total for 65000 Legal Fees	**1,000.00**	**1,967.00**		**$2,967.00**
66000 Accounting	1,010.00	955.00	955.00	2,920.00
69000 Fees & Charges				
69006 Loan Servicing Fees	510.00	510.00	510.00	1,530.00
Total for 69000 Fees & Charges	**510.00**	**510.00**	**510.00**	**$1,530.00**
71000 Local Industry Support			80,000.00	80,000.00
71805 Bus Advocacy Empowerment Intitative		12,500.00		12,500.00
73000 Marketing	5,274.42	3,516.33	3,500.00	12,290.75
73125 AJFA Sponsorship	25,000.00			25,000.00
80000 Restricted Expenses				
80025 Business Appreciation Event		829.81		829.81
Total for 80000 Restricted Expenses		**829.81**		**$829.81**
Total for Expenditures	**33,017.42**	**20,503.14**	**85,183.00**	**$138,703.56**
Net Operating Revenue	**-25,146.82**	**-9,331.33**	**-77,194.97**	**-$111,673.12**
Net Other Revenue				
Net Revenue	**-25,146.82**	**-9,331.33**	**-77,194.97**	**-$111,673.12**

EDA

Statement of Activity by Class - Comm/Bus Support

July 2025 - March 2026

	COMMUNITY & BUS SUPPORT	TOTAL
Revenue		
Total Revenue		**$0.00**
GROSS PROFIT	**$0.00**	**$0.00**
Expenditures		
73125 AJFA Sponsorship	25,000.00	$25,000.00
Total Expenditures	**$25,000.00**	**$25,000.00**
NET OPERATING REVENUE	**$ -25,000.00**	**$ -25,000.00**
NET REVENUE	**$ -25,000.00**	**$ -25,000.00**

EDA

Statement of Activity by Class - County/BOS Support

July 2025 - March 2026

	COUNTY/BOS SUPPORT	TOTAL
Revenue		
Total Revenue		**$0.00**
GROSS PROFIT	**$0.00**	**$0.00**
Expenditures		
71000 Local Industry Support	5,000.00	$5,000.00
Total Expenditures	**$5,000.00**	**$5,000.00**
NET OPERATING REVENUE	**$ -5,000.00**	**$ -5,000.00**
NET REVENUE	**$ -5,000.00**	**$ -5,000.00**

EDA

Statement of Activity by Class - Fundraising

July 2025 - March 2026

	FUNDRAISING	EVENTS	BEER & BUSINESS	BUSINESS APPRECIATION	TOTAL EVENTS	TOTAL FUNDRAISING	TOTAL
Revenue							
60000 Restricted Income							$0.00
60050 Business Appreciation sponsors			2,442.00	7,475.00	9,917.00	9,917.00	$9,917.00
Total 60000 Restricted Income			**2,442.00**	**7,475.00**	**9,917.00**	**9,917.00**	**$9,917.00**
Total Revenue	**$0.00**	**$0.00**	**$2,442.00**	**$7,475.00**	**$9,917.00**	**$9,917.00**	**$9,917.00**
Cost of Goods Sold							
Channel selling fees							$0.00
Square fees			41.29		41.29	41.29	$41.29
Total Channel selling fees			**41.29**		**41.29**	**41.29**	**$41.29**
Total Cost of Goods Sold	**$0.00**	**$0.00**	**$41.29**	**$0.00**	**$41.29**	**$41.29**	**$41.29**
GROSS PROFIT	**$0.00**	**$0.00**	**$2,400.71**	**$7,475.00**	**$9,875.71**	**$9,875.71**	**$9,875.71**
Expenditures							
64100 Donation				2,000.00	2,000.00	2,000.00	$2,000.00
74000 EDA Meetings/Meals			1,077.07		1,077.07	1,077.07	$1,077.07
80000 Restricted Expenses							$0.00
80025 Business Appreciation Event			2,745.41		2,745.41	2,745.41	$2,745.41
Total 80000 Restricted Expenses			**2,745.41**		**2,745.41**	**2,745.41**	**$2,745.41**
Total Expenditures	**$0.00**	**$0.00**	**$3,822.48**	**$2,000.00**	**$5,822.48**	**$5,822.48**	**$5,822.48**
NET OPERATING REVENUE	**$0.00**	**$0.00**	**$ -1,421.77**	**$5,475.00**	**$4,053.23**	**$4,053.23**	**$4,053.23**
NET REVENUE	**$0.00**	**$0.00**	**$ -1,421.77**	**$5,475.00**	**$4,053.23**	**$4,053.23**	**$4,053.23**

EDA

Statement of Activity by Class - Grants

July 2025 - March 2026

	GRANTS	TOTAL
Revenue		
Total Revenue		**$0.00**
GROSS PROFIT	**$0.00**	**$0.00**
Expenditures		
71000 Local Industry Support	80,000.00	$80,000.00
71805 Bus Advocacy Empowerment Intitative	12,500.00	$12,500.00
Total Expenditures	**$92,500.00**	**$92,500.00**
NET OPERATING REVENUE	**$ -92,500.00**	**$ -92,500.00**
NET REVENUE	**$ -92,500.00**	**$ -92,500.00**

EDA

Statement of Activity by Class - Loans

July 2025 - March 2026

	LOANS	TOTAL
Revenue		
46500 Micro Loan Income		$0.00
46501 Micro Loan Interest Income	14,235.30	$14,235.30
46502 Micro Loan Fees	781.26	$781.26
Total 46500 Micro Loan Income	**15,016.56**	**$15,016.56**
Total Revenue	**$15,016.56**	**$15,016.56**
GROSS PROFIT	**$15,016.56**	**$15,016.56**
Expenditures		
65000 Legal Fees		$0.00
65004 General Retainer Matters	967.00	$967.00
Total 65000 Legal Fees	**967.00**	**$967.00**
69000 Fees & Charges		$0.00
69006 Loan Servicing Fees	5,535.00	$5,535.00
Total 69000 Fees & Charges	**5,535.00**	**$5,535.00**
Total Expenditures	**$6,502.00**	**$6,502.00**
NET OPERATING REVENUE	**$8,514.56**	**$8,514.56**
NET REVENUE	**$8,514.56**	**$8,514.56**

EDA

Statement of Activity by Class - Operating

July 2025 - March 2026

	OPERATING	TOTAL
Revenue		
42000 Bond Issuance fees	3,767.40	$3,767.40
46400 Bank Interest	24,053.38	$24,053.38
60000 Restricted Income		$0.00
60050 Business Appreciation sponsors	0.00	$0.00
Total 60000 Restricted Income	**0.00**	**$0.00**
Total Revenue	**$27,820.78**	**$27,820.78**
GROSS PROFIT	**$27,820.78**	**$27,820.78**
Expenditures		
62000 Administration	175.00	$175.00
63100 Software Expense	878.00	$878.00
63500 Insurance		$0.00
63501 General Insurance	1,084.50	$1,084.50
Total 63500 Insurance	**1,084.50**	**$1,084.50**
65000 Legal Fees		$0.00
65004 General Retainer Matters	15,839.86	$15,839.86
Total 65000 Legal Fees	**15,839.86**	**$15,839.86**
66000 Accounting	8,760.00	$8,760.00
66001 Audit (Annual Financial)	15,300.00	$15,300.00
69000 Fees & Charges		$0.00
69002 Bank Fee	80.00	$80.00
Total 69000 Fees & Charges	**80.00**	**$80.00**
73000 Marketing	33,260.56	$33,260.56
74000 EDA Meetings/Meals	286.90	$286.90
Total Expenditures	**$75,664.82**	**$75,664.82**
NET OPERATING REVENUE	**$ -47,844.04**	**$ -47,844.04**
NET REVENUE	**$ -47,844.04**	**$ -47,844.04**

EDA

Statement of Activity by Class - Pass Through

July 2025 - March 2026

	TOTAL
Revenue	
Total Revenue	
GROSS PROFIT	
Expenditures	
Total Expenditures	
NET OPERATING REVENUE	
NET REVENUE	

Statement of Activity

Economic Development Authority of Stafford County

March 2026

	TOTAL
Revenue	
46400 Bank Interest	3,516.69
46500 Micro Loan Income	
46501 Micro Loan Interest Income	2,278.30
46502 Micro Loan Fees	193.04
Total for 46500 Micro Loan Income	**$2,471.34**
60000 Restricted Income	
60050 Business Appreciation sponsors	2,000.00
Total for 60000 Restricted Income	**$2,000.00**
Total for Revenue	**$7,988.03**
Gross Profit	**$7,988.03**
Expenditures	
63100 Software Expense	97.50
63500 Insurance	
63501 General Insurance	120.50
Total for 63500 Insurance	**$120.50**
66000 Accounting	955.00
69000 Fees & Charges	
69006 Loan Servicing Fees	510.00
Total for 69000 Fees & Charges	**$510.00**
71000 Local Industry Support	80,000.00
73000 Marketing	3,500.00
Total for Expenditures	**$85,183.00**
Net Operating Revenue	**-$77,194.97**
Net Other Revenue	
Net Revenue	**-$77,194.97**

EDA

Statement of Activity Prev Year Comparison

July 2025 - March 2026

	TOTAL			
	JUL 2025 - MAR 2026	JUL 2024 - MAR 2025 (PY)	CHANGE	% CHANGE
Revenue				
42000 Bond Issuance fees	3,767.40	4,000.39	-232.99	-5.82 %
46400 Bank Interest	24,053.38	23,050.24	1,003.14	4.35 %
46500 Micro Loan Income	0.00	0.00	0.00	
46501 Micro Loan Interest Income	14,235.30	17,939.31	-3,704.01	-20.65 %
46502 Micro Loan Fees	781.26	8,353.56	-7,572.30	-90.65 %
46503 Late Fee Charges	0.00	450.69	-450.69	-100.00 %
Total 46500 Micro Loan Income	**15,016.56**	**26,743.56**	**-11,727.00**	**-43.85 %**
47000 Property Interest Income	0.00	0.00	0.00	
47100 Interest Inc-1318 JD Hwy	0.00	7,912.57	-7,912.57	-100.00 %
Total 47000 Property Interest Income	**0.00**	**7,912.57**	**-7,912.57**	**-100.00 %**
48000 Other Income	0.00	4,095.00	-4,095.00	-100.00 %
48751 GO VA Grant Income 2	0.00	70,000.00	-70,000.00	-100.00 %
60000 Restricted Income	0.00	0.00	0.00	
60050 Business Appreciation sponsors	9,917.00	2,400.00	7,517.00	313.21 %
Total 60000 Restricted Income	**9,917.00**	**2,400.00**	**7,517.00**	**313.21 %**
Total Revenue	**$52,754.34**	**$138,201.76**	**$ -85,447.42**	**-61.83 %**
Cost of Goods Sold				
Channel selling fees	0.00	0.00	0.00	
Square fees	41.29	0.00	41.29	
Total Channel selling fees	**41.29**	**0.00**	**41.29**	
Total Cost of Goods Sold	**$41.29**	**$0.00**	**$41.29**	**0.00%**
GROSS PROFIT	**$52,713.05**	**$138,201.76**	**$ -85,488.71**	**-61.86 %**
Expenditures				
62000 Administration	175.00	477.32	-302.32	-63.34 %
63100 Software Expense	878.00	718.48	159.52	22.20 %
63500 Insurance	0.00	0.00	0.00	
63501 General Insurance	1,084.50	1,091.97	-7.47	-0.68 %
Total 63500 Insurance	**1,084.50**	**1,091.97**	**-7.47**	**-0.68 %**
64100 Donation	2,000.00	250.00	1,750.00	700.00 %
65000 Legal Fees	0.00	0.00	0.00	
65003 Project Representation	0.00	5,672.32	-5,672.32	-100.00 %
65004 General Retainer Matters	16,806.86	12,953.50	3,853.36	29.75 %
Total 65000 Legal Fees	**16,806.86**	**18,625.82**	**-1,818.96**	**-9.77 %**
66000 Accounting	8,760.00	8,100.00	660.00	8.15 %
66001 Audit (Annual Financial)	15,300.00	14,850.00	450.00	3.03 %
66500 Professional Services	0.00	4,825.00	-4,825.00	-100.00 %

EDA

Statement of Activity Prev Year Comparison

July 2025 - March 2026

	TOTAL			
	JUL 2025 - MAR 2026	JUL 2024 - MAR 2025 (PY)	CHANGE	% CHANGE
69000 Fees & Charges	0.00	0.00	0.00	
69002 Bank Fee	80.00	40.00	40.00	100.00 %
69004 Service Fee	0.00	225.00	-225.00	-100.00 %
69006 Loan Servicing Fees	5,535.00	4,200.00	1,335.00	31.79 %
69007 Interest Paid	0.00	8.40	-8.40	-100.00 %
Total 69000 Fees & Charges	**5,615.00**	**4,473.40**	**1,141.60**	**25.52 %**
71000 Local Industry Support	85,000.00	24,000.00	61,000.00	254.17 %
71805 Bus Advocacy Empowerment Intitative	12,500.00	0.00	12,500.00	
73000 Marketing	33,260.56	31,062.98	2,197.58	7.07 %
73125 AJFA Sponsorship	25,000.00	25,000.00	0.00	0.00 %
74000 EDA Meetings/Meals	1,363.97	527.90	836.07	158.38 %
80000 Restricted Expenses	0.00	0.00	0.00	
80025 Business Appreciation Event	2,745.41	1,012.94	1,732.47	171.03 %
80030 BACC	0.00	2,000.00	-2,000.00	-100.00 %
Total 80000 Restricted Expenses	**2,745.41**	**3,012.94**	**-267.53**	**-8.88 %**
Total Expenditures	**$210,489.30**	**$137,015.81**	**$73,473.49**	**53.62 %**
NET OPERATING REVENUE	**$ -157,776.25**	**$1,185.95**	**$ -158,962.20**	**-13,403.79 %**
NET REVENUE	**$ -157,776.25**	**$1,185.95**	**$ -158,962.20**	**-13,403.79 %**

EDA

Statement of Activity YTD Comparison

March 2026

	TOTAL	
	MAR 2026	JUL 2025 - MAR 2026 (YTD)
Revenue		
42000 Bond Issuance fees	0.00	3,767.40
46400 Bank Interest	3,516.69	24,053.38
46500 Micro Loan Income	0.00	0.00
46501 Micro Loan Interest Income	2,278.30	14,235.30
46502 Micro Loan Fees	193.04	781.26
Total 46500 Micro Loan Income	**2,471.34**	**15,016.56**
60000 Restricted Income	0.00	0.00
60050 Business Appreciation sponsors	2,000.00	9,917.00
Total 60000 Restricted Income	**2,000.00**	**9,917.00**
Total Revenue	**$7,988.03**	**$52,754.34**
Cost of Goods Sold		
Channel selling fees	0.00	0.00
Square fees	0.00	41.29
Total Channel selling fees	**0.00**	**41.29**
Total Cost of Goods Sold	**$0.00**	**$41.29**
GROSS PROFIT	**$7,988.03**	**$52,713.05**
Expenditures		
62000 Administration	0.00	175.00
63100 Software Expense	97.50	878.00
63500 Insurance	0.00	0.00
63501 General Insurance	120.50	1,084.50
Total 63500 Insurance	**120.50**	**1,084.50**
64100 Donation	0.00	2,000.00
65000 Legal Fees	0.00	0.00
65004 General Retainer Matters	0.00	16,806.86
Total 65000 Legal Fees	**0.00**	**16,806.86**
66000 Accounting	955.00	8,760.00
66001 Audit (Annual Financial)	0.00	15,300.00
69000 Fees & Charges	0.00	0.00
69002 Bank Fee	0.00	80.00
69006 Loan Servicing Fees	510.00	5,535.00
Total 69000 Fees & Charges	**510.00**	**5,615.00**
71000 Local Industry Support	80,000.00	85,000.00
71805 Bus Advocacy Empowerment Intitative	0.00	12,500.00
73000 Marketing	3,500.00	33,260.56
73125 AJFA Sponsorship	0.00	25,000.00
74000 EDA Meetings/Meals	0.00	1,363.97

EDA

Statement of Activity YTD Comparison

March 2026

	TOTAL	
	MAR 2026	JUL 2025 - MAR 2026 (YTD)
80000 Restricted Expenses	0.00	0.00
80025 Business Appreciation Event	0.00	2,745.41
Total 80000 Restricted Expenses	**0.00**	**2,745.41**
Total Expenditures	**$85,183.00**	**$210,489.30**
NET OPERATING REVENUE	**$ -77,194.97**	**$ -157,776.25**
NET REVENUE	**$ -77,194.97**	**$ -157,776.25**

Statement of Financial Position

Economic Development Authority of Stafford County

As of Mar 31, 2026

	TOTAL
Assets	
Current Assets	
Bank Accounts	
10100 Checking- Operating - Linkbank 2143	23,553.42
10102 Checking Testbed Linkbank 4016	6,990.00
10103 Money Market Linkbank 0572	17,941.17
10104 Checking Municipal - Linkbank 0071	84,561.75
10910 Square deposit account	0.00
Total for Bank Accounts	**$133,046.34**
Accounts Receivable	
11000 Accounts Receivable	0.00
Total for Accounts Receivable	**$0.00**
Other Current Assets	
11500 Other Accounts Receivable	$0.00
11500.02 Embry Mill 1	200.12
11500.03 Embry Mill 2	102.58
11500.04 Ace Flight Solutions	41.69
11500.05 Columbus Cartopraphy	0.00
11500.06 Next Level Mosaic	1,935.00
Total for 11500 Other Accounts Receivable	**$2,279.39**
12000 Undeposited Income	0.00
124000 VA Mint Enhanced Cash Pool	980,613.48
12500 Accrued Income	0.00
13000 Prepaid Expense	361.50
13500 Cash held for pledges	0.00
14500 Property Trans-Sales/Donations	0.00
Total for Other Current Assets	**$983,254.37**
Total for Current Assets	**$1,116,300.71**
Fixed Assets	
15000 Land Stafford County	0.00
16000 Accum Depreciation	0.00
Total for Fixed Assets	**$0.00**
Other Assets	
17700 Investments/CDs	
17999 Unreal Gain/Loss Adj on Invstmt	0.00
Total for 17700 Investments/CDs	**$0.00**
18000 Long Term Loan Rcvbs	
18200 Long Term Note - Ace Flight	3,246.65
Total for 18000 Long Term Loan Rcvbs	**$3,246.65**

Statement of Financial Position

Economic Development Authority of Stafford County

As of Mar 31, 2026

	TOTAL
18900 VCC Bank Loans	
18904 Embrey Mill Primary Urgent Care	45,469.16
18906 Columbus Cartography	619.56
18907 Next Level Mosaic LLC	142,250.55
18908 Santana Holdings	46,332.37
18909 Embrey Mill (2nd loan)	32,792.37
Total for 18900 VCC Bank Loans	**$267,464.01**
Total for Other Assets	**$270,710.66**
Total for Assets	**$1,387,011.37**
Liabilities and Equity	
Liabilities	
Current Liabilities	
Accounts Payable	
20000 Accounts Payable	83,500.00
Total for Accounts Payable	**$83,500.00**
Other Current Liabilities	
21000 Unearned Revenue	15,770.11
22000 Other Accrued Liabilities	0.00
Total for Other Current Liabilities	**$15,770.11**
Total for Current Liabilities	**$99,270.11**
Total for Liabilities	**$99,270.11**
Equity	
32000 Undesignated Fund Balance	1,445,517.51
Net Income	-157,776.25
Total for Equity	**$1,287,741.26**
Total for Liabilities and Equity	**$1,387,011.37**

Statement of Activity Detail

Economic Development Authority of Stafford County

March 2026

TRANSACTION DATE	TRANSACTION TYPE	NUM	NAME	LOCATION	CLASS FULL NAME	MEMO/DESCRIPTION	ITEM SPLIT ACCOUNT	AMOUNT	BALANCE
Ordinary Income/Expenses									
Income									
46400 Bank Interest									
03/31/2026	Deposit		Linkbank		Operating	INTEREST DEPOSIT	Money Market Linkbank 0572	40.36	40.36
03/31/2026	Deposit		Linkbank		Operating		Checking Municipal - Linkbank 0071	207.55	247.91
03/31/2026	Journal Entry	NJNsk243			Operating	to record dividend income for Mar 2026		3,268.78	3,516.69
Total for 46400 Bank Interest								**$3,516.69**	
46500 Micro Loan Income									
46501 Micro Loan Interest Income									
03/01/2026	Journal Entry	NJNsk238			Loans	to record Mar 2026 loan payment		133.37	133.37
03/01/2026	Journal Entry	NJNsk239			Loans	to record Mar 26 loan payment		188.96	322.33
03/01/2026	Journal Entry	NJNsk240			Loans	to record Mar 26 loan payment		13.26	335.59
03/01/2026	Journal Entry	NJNsk241			Loans	to record Mar 26 loan payment		7.71	343.30
03/26/2026	Journal Entry	NJNsk242			Loans	to record Mar 26 loan payment		1,935.00	2,278.30
Total for 46501 Micro Loan Interest Income								**$2,278.30**	
46502 Micro Loan Fees									
03/01/2026	Journal Entry	NJNsk238			Loans	to record Mar 2026 loan payment		100.06	100.06
03/01/2026	Journal Entry	NJNsk239			Loans	to record Mar 26 loan payment		51.29	151.35
03/01/2026	Journal Entry	NJNsk240			Loans	to record Mar 26 loan payment		41.69	193.04
Total for 46502 Micro Loan Fees								**$193.04**	
Total for 46500 Micro Loan Income with sub-accounts								**$2,471.34**	
60000 Restricted Income									
60050 Business Appreciation sponsors									
03/04/2026	Deposit		Germanna Community College J/E		Fundraising:Events:Business Appreciation	2026 BAR	Checking- Operating - Linkbank 2143	2,000.00	2,000.00
Total for 60050 Business Appreciation sponsors								**$2,000.00**	
Total for 60000 Restricted Income with sub-accounts								**$2,000.00**	
Total for Income with sub-accounts								**$7,988.03**	
Cost of Goods Sold									
Gross Profit								**$7,988.03**	
Expenses									
63100 Software Expense									
03/25/2026	Bill	6924	Not Just Numbers Inc		Operating	QBO Subscription	Accounts Payable	80.50	80.50
03/25/2026	Bill	6924	Not Just Numbers Inc		Operating	Contractor Payments Subscription	Accounts Payable	10.50	91.00
03/25/2026	Bill	6924	Not Just Numbers Inc		Operating	QBO Backup	Accounts Payable	6.50	97.50
Total for 63100 Software Expense								**$97.50**	
66000 Accounting									
03/25/2026	Bill	6924	Not Just Numbers Inc		Operating	10hr Managed Service Package	Accounts Payable	900.00	900.00
03/25/2026	Bill	6924	Not Just Numbers Inc		Operating	Monthly EDA Meeting	Accounts Payable	55.00	955.00
Total for 66000 Accounting								**$955.00**	

Statement of Activity Detail

Economic Development Authority of Stafford County

March 2026

TRANSACTION DATE	TRANSACTION TYPE	NUM	NAME	LOCATION	CLASS FULL NAME	MEMO/DESCRIPTION	ITEM SPLIT ACCOUNT	AMOUNT	BALANCE
71000 Local Industry Support									
03/26/2026	Bill	20634	Micah Ecumenical Ministries		Grants	Jeremiah Community Pledge	Accounts Payable	80,000.00	80,000.00
Total for 71000 Local Industry Support								**$80,000.00**	
73000 Marketing									
03/31/2026	Bill	544	Brolin Creative LLC		Operating	March 2025	Accounts Payable	3,500.00	3,500.00
Total for 73000 Marketing								**$3,500.00**	
63500 Insurance									
63501 General Insurance									
03/01/2026	Journal Entry	NJNsk230			Operating	to record monthly insurance expense allocation		120.50	120.50
Total for 63501 General Insurance								**$120.50**	
Total for 63500 Insurance with sub-accounts								**$120.50**	
69000 Fees & Charges									
69006 Loan Servicing Fees									
03/31/2026	Bill	1453	Bridging Virginia		Loans	March 2026	Accounts Payable	510.00	510.00
Total for 69006 Loan Servicing Fees								**$510.00**	
Total for 69000 Fees & Charges with sub-accounts								**$510.00**	
Total for Expenses with sub-accounts								**$85,183.00**	
Net Ordinary Income								**-$77,194.97**	
Other Income/Expense									
Other Income									
Other Expense									
Net Other Income									
Net Income								**-$77,194.97**	

5A

AI Education, Workforce & Regional Partnership

UMW
CAILA

A Briefing for the Stafford County Economic Development Authority

P. Anand Rao, PhD
Professor, Communication and Digital Studies
Founding Director, Center for AI & the Liberal Arts (CAILA)
University of Mary Washington | April 17, 2026

What is CAILA?

Students

Curricular and extracurricular AI learning pathways — from the intro IDIS 300 course to the AI in Practice certificate (15 credits)

Faculty

Workshops, webinars, and resources to help UMW faculty integrate AI tools and pedagogy into their courses

Public

Public events, debates, and community programming on AI's social, ethical, and economic impacts

Launched August 2025 • IDIS 300 drew 250 students (4.7/5.0 rating) • 68% said it should be required or recommended

University *of*
Mary Washington
Center for AI and the Liberal Arts

UMW Center for AI and the ...

NotebookLM

by University of Mary Washington

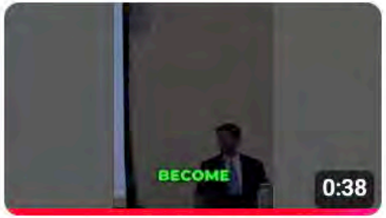
Playlist • Public • 58 videos • 67 views

Events sponsored by UMW's Center for AI and the Liberal Arts

Play all

Most popular | All | Videos | Shorts

1



Human Skills: The REAL Value in the Age of AI

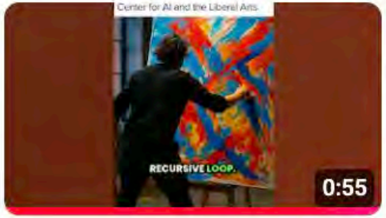
University of Mary Washington • 1.2K views • 3 weeks ago

2

AI Tools Webinar: PlayLab.ai - Sept 30, 2025

University of Mary Washington • 910 views • 6 months ago

3



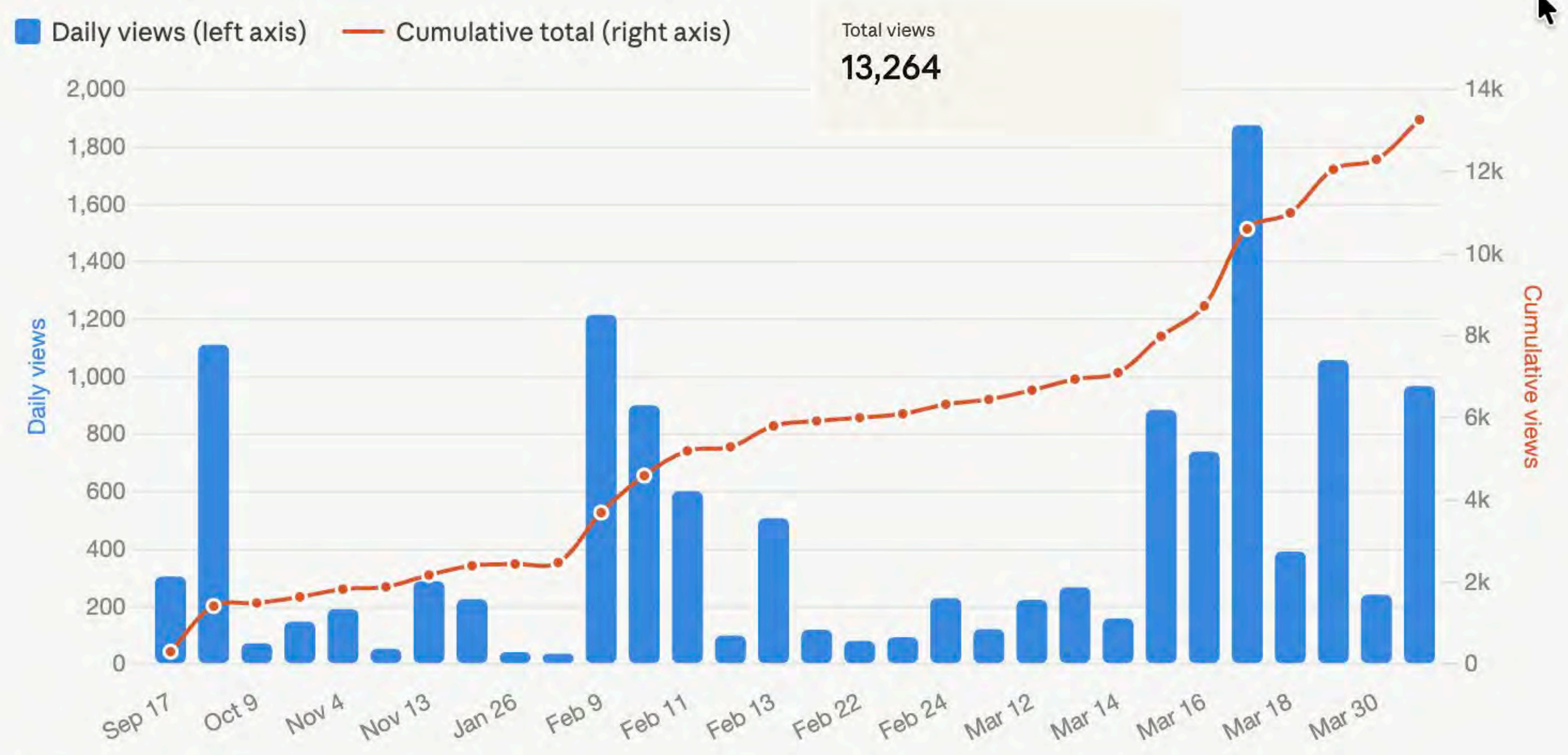
AI art: a recursive loop

University of Mary Washington • 848 views • 10 days ago

4

AI Skills: The 56% Wage Premium You Can't Ignore

University of Mary Washington • 691 views • 2 months ago



Note: daily views are attributed to each video's publish date. Days with no published content show zero.

How AI Injects Efficiency into Business Processes

Automate Repetitive Tasks

AI handles data entry, report generation, scheduling, and document review — freeing staff for higher-value work.

Enhance Decision-Making

Agentic AI tools synthesize large datasets to surface actionable insights for managers and executives.

Accelerate Incentive Development

AI can rapidly analyze regional economic data, benchmark incentive packages, and model ROI scenarios for site selectors.

Streamline Communication

Generative AI drafts proposals, grant applications, and stakeholder reports in a fraction of the time.

What Our Students Learn to Do

- Build no-code AI chatbots
- Audit AI outputs critically
- Manage agentic workflows
- Evaluate trustworthy AI
- Communicate AI decisions
- Lead AI-driven teams

AI in Practice Certificate: Building Mid-Level AI Leaders

15-credit certificate program preparing students for mid-level management roles in AI-driven organizations

01	02	03	04	05
Intro to AI	**AI & Communication**	**Critical Thinking & AI**	**Collaboration & Leadership**	**Agentic AI in Practice**
IDIS 300 — Foundations, ethics, neural networks	Persuasion, human-AI interaction, writing	Argumentation, bias, accountability	Team management, trust, governance	Workflows, automation, oversight

Graduates enter the workforce ready to manage AI tools, workflows, and teams — not just use them

Augmenting SCPS Pathways: The 3 E's Framework

E
Enrollment

College & University

UMW's IDIS 300 is available free to incoming first-year students as an early AI credential. Dual enrollment for high school juniors and seniors is actively under discussion with area schools.

E
Employment

Workforce Ready

The AI in Practice certificate prepares graduates for in-demand mid-level roles in business, government, and tech. CAILA actively connects students to internships and workforce partners like EDA.

E
Enlistment

Military Pathways

AI literacy enhances military readiness. CAILA coursework builds critical thinking, ethical AI use, and tech adaptability — skills valued across all military branches.

Partnership Opportunities for EDA & CAILA

AI Pitch Competitions

Co-sponsor regional pitch contests for UMW students and SCPS high schoolers. Winners receive scholarships, internships, and business mentorship.

Business Internships

EDA-connected businesses host CAILA students for AI implementation projects — real-world experience, no-cost AI consulting.

K-12 AI Pathways

Expand CAILA's Stafford County AI literacy workshops into formal SCPS Pathways curriculum. We have already delivered workshops to SCPS teachers.

Co-Sponsored Events

CAILA's public debate and event series reaches local audiences — EDA co-sponsorship builds regional visibility for economic development.

Workforce Pipeline

Formalize a pipeline connecting CAILA graduates to Stafford County businesses, reducing talent recruitment friction.

Hackathons

Host AI hackathons with EDA business partners as challenge providers — generating real solutions to local business problems.

UMW + SCPS: An Established Partnership

High	9th	VDOE	ATI-UMW
Teacher Satisfaction	Grade Focus	RFI Response	Intro to AI
SCPS Workshops	*AI Literacy Pilot*	*Consortium Submitted*	*Pilot Course*

What CAILA Has Already Done in Stafford County

- Delivered AI literacy workshops to SCPS teachers with high satisfaction ratings
- Developed a comprehensive AI literacy proposal for SCPS targeting 9th-grade English students
- Submitted a VDOE RFI response as part of a regional consortium
- Pursuing grant funding to scale AI literacy programming region-wide
- Exploring dual enrollment pathways for juniors and seniors in IDIS 300

Let's Build Together

Proposed Next Steps for EDA × CAILA Partnership

1 Formalize the Partnership

Develop a measure of commitment between EDA and CAILA to signal regional intent

2 Launch an AI Pitch Competition

Co-sponsor a Fall 2026 competition for UMW students and SCPS seniors with business prizes

3 Create an Internship Pipeline

Match CAILA students to EDA-connected businesses for AI implementation projects

4 Expand K-12 AI Literacy

Bring CAILA's SCPS AI literacy proposal to scale through EDA co-sponsorship

5B

Fredericksburg Military Affairs Council (MAC)

Brief to Stafford County Board of Supervisors

Joe Caliri (Chair)
Dale Sisson (Vice Chair)
Dr. John Burrow (Past Chair)

Our Focus for 2026

Mobilize

- Raise community awareness about the military's contributions to security, prosperity, and innovation.
- Share clear data on economic impact, workforce strength, and industry partnerships.
- Facilitate opportunities to engage with and support defense activities between regional businesses, leaders, and residents.

Advance

- Promote the strategic importance of more than 25 military commands, our veterans, and installations in the Fredericksburg region.
- Showcase the $9+ billion annual economic impact through jobs, contracts, and local investment.
- Drive sustained support and growth of defense missions that strengthen both national security and the regional economy.

Connect

- Build strong partnerships between military installations, local governments, businesses, and the community.
- Foster relationships that support service members, military families, veterans, and the regional workforce.
- Build a shared sense of purpose and collaboration to ensure lasting regional strength and resilience.

2026 MAC Journey Map

Vision – Innovative Eco-System

Mission Alignment

Thank you to our sponsors

10-7at

Atlantic Union Bank

BCI

BLACK KNIGHT TECHNOLOGY

Booz Allen

BOWHEAD

DAHLGREN HERITAGE MUSEUM
PRESERVING NAVAL HISTORY

FRA

GEORGE WASHINGTON REGIONAL COMMISSION

GTS GLOBAL TECHNICAL SYSTEMS

HUNATEK
A HUNA TOTEM COMPANY

JBURROW LLC

JCDRAKE LLC

Kalahari RESORTS & CONVENTIONS

KITTY HAWK TECHNOLOGIES

LINKBANK

MITRE

PSFS PARRISH SNEAD FRANKLIN SIMPSON

RIPHEAN INVESTMENTS

RPIGROUP

Sigma Defense

SimVentions

Sky Eagle Associates LLC

Topside Federal Credit Union

Weecycled Wardrobe

INDIVIDUAL CONTRIBUTORS

BOB SHAW
BILL HESSION
DANIELA BRANHAM
GLEN ACKERMANN
JERRY WYNES
JOHN FIORE
MARK KELLEY
MICHAEL WOODCOCK
MIKE HUBBARD
NICK MINOR

Questions?

Back Up

2026 Organization

Executive Committee

Chairman: Joe Caliri (SimVentions)
Vice Chair: Dale Sisson (GTS)
Past Chair: John Burrow (JBurrow LLC)
Treasurer: Bill Hession (Self)
Secretary: Christine Goodwin (Banduri)

Directors

Daniela Branham (Self)
June Drake (JCDrake LLC)
John Fiore (Kitty Hawk)
Victor Fuster (Riphean Investments)
Rob Gates (Self)
Michael Hubbard (Self)
Jamie Scully (Thalhimer)
Andy Thompson (Mitre)
Michael Till (Bowhead)
Michael Woodcock (Self)

Communications

Lucy Gentry

Board Size:

- Minimum of 5 and maximum of 20 Directors
- Number set periodically by the Board

Composition & Election:

- Directors are sponsor representatives elected by the Board

5C

EDA STAFFORD Virginia

Beer & BUSINESS

The Stafford Beer & Business Series is a quarterly outing provided by the Stafford County Economic Development Authority. These events are designed to connect local professionals across all markets.

In addition to networking, each Beer & Business outing will have a brief insightful "Raw Truth" of an industry specific discussion, led by a local expert. That expert could be you!

Join the Stafford business community for networking and some light, yet insightful business discussion.

Beer & Business is free to attend, and includes a beverage and some light appetizers. Registration is REQUIRED.

Come network in Stafford, VA

Sponsorship:

Stafford Beer & Business Sponsorship Package: $1,200

Exclusive sponsor for 1 of 6 available Beer & Business events (one Wine & Business)

- Prominent recognition and inclusion of logo on event materials and marketing
- Sponsor has first right of refusal to be the topic speaker at the event
- Sponsor will be recognized on dedicated signage at the event check-in
- Sponsor provided banner placed in the event area
- Public thank you during remarks

Event Schedule:

May 2026 | 4-5:30 PM | Potomac Point Winery

August 2026 | 4-5:30 PM | Barley Naked

November 2026 | 4-5:30 PM | Laudenbach Brewing

February 2027 | 4-5:30 PM | 6 Bears and A Goat

May 2027 | 4-5:30 PM | Highmark Brewery

August 2027 | 4-5:30 PM | Full Distance Brewing

Become a Sponsor!

To become a sponsor/speaker, contact Linzy Browne,
(540) 658-8681
lbrowne@staffordcountyva.gov

LIMITED sponsorship available

CONTACT NOW

8A

Total Advances (LNA)	$ -	Total Payments (LNA)	$ 7,509.99
Less Rev Adv Entries (LNA)	$	Total Payments (DDA)	$ -
Total Advances (DDA)	$ -	Input 1_Total Early Pmts - Last Month (DDA)	$ -
Advance Difference	$ -	Input 2_Total Early Pmts - This Month (DDA)	$ -
Non-Cash: Misc (LNA)	$ -	Reversed Payments	$ -
Non-Cash: Int Adj (LNA)	$ -	Input 3_Mis Balancing Items	$ -
Total LNA Activity Difference	$ -	Payment Difference	$ 7,509.99
	Late Charges	Auto ACH Variance	#VALUE!

Totals

FX=Fee Charge
RVN = Payment Reversal
CH/CHN = No payment made during the period
AI = Accure Interest

Total Payment	Interest Paid	Principal Paid	Fees Paid	Fee Charged
$ 7,509.99	$ 632.30	$ 6,877.69	$ -	$ 96.75

LNA Transactions

Fund Name	Loan Identifier	Customer Name	Date Posted	ransaction Cod	Total Payment	Interest Paid	Principal Paid	Fees Charged	Fees Paid	Current Balance	ACH Bank
Stafford Serviced Loan Liability	3003000002	ACE Flight Solutions	3/2/2026	PM	833.83	13.26	820.57			3,246.65	
Stafford Serviced Loan Liability	3003000005	Embry Mill Primary and Urgent Care LLC*	3/5/2026	LPM	2,001.19	120.35	1,880.84			47,336.98	
Stafford Serviced Loan Liability	3003000005	Embry Mill Primary and Urgent Care LLC	3/24/2026	PM	2,001.19	133.37	1,867.82			45,469.16	
Stafford Serviced Loan Liability	3003000007	Columbus Cartography, LLC	3/2/2026	PM	622.12	7.71	614.41			619.56	
Stafford Serviced Loan Liability	3003000008	Next Level Mosaic, LLC	3/11/2026	CH					96.75	142,250.55	
Stafford Serviced Loan Liability	3003000009	Santana Holdings LLC	3/1/2026	AI						46,332.37	
Stafford Serviced Loan Liability	3003000010	Embry Mill 2*	3/5/2026	LPM	1,025.83	168.65	857.18			33,629.24	
Stafford Serviced Loan Liability	3003000010	Embry Mill 2	3/24/2026	PM	1,025.83	188.96	836.87			32,792.37	

* Late payments for Febraury

Trial Balance

Fund Name	Customer Name	Account Number	Date Opened	Original Commitment Amount	Current Balance	Unused Commitment	Next Draw Expiration Date	Interest Rate	Maturity Date	Risk Rating Code
Stafford Serviced Loan Liabi	ACE Flight Solutions	3003000002	7/9/2021	$ 45,000.00	$ 3,246.65	$ -		4.25	8/1/2026	
Stafford Serviced Loan Liabi	Columbus Cartography, LLC	3003000007	3/13/2023	$ 20,000.00	$ 619.56	$ -		7.5	5/1/2026	
Stafford Serviced Loan Liabi	Embry Mill 2	3003000010	10/16/2023	$ 50,000.00	$ 32,792.37	$ -		8.5	12/1/2028	
Stafford Serviced Loan Liabi	Embry Mill Primary and Urge	3003000005	7/18/2022	$ 108,000.00	$ 45,469.16	$ -		4.25	7/1/2027	
Stafford Serviced Loan Liabi	Next Level Mosaic, LLC	3003000008	7/20/2023	$ 151,000.00	$ 142,250.55	$ -		8.5	9/1/2033	
Stafford Serviced Loan Liabi	Santana Holdings LLC*	3003000009	10/10/2023	$ 50,000.00	$ 46,332.37	$ -		6	11/1/2028	
Stafford Serviced Loan Liabi	Stellar Investments LLC	3003000006	3/9/2023	$ 10,000.00	$ -	$ -		7.5	5/1/2026	
Stafford Serviced Loan Liabi	Vitae Visual LLC	3003000003	3/25/2022	$ 15,000.00	$ -	$ -		4.25	5/1/2025	
			Total	**$ 449,000.00**	**$ 270,710.66**					

*As of December 13th, 2024, loan was written off and judgement has been issued. Interest rate has been updated to 6.00%

Fund Name	Customer Name	Account Number	Date Opened	Original Commitment Amoun	Current Balance	Fee Balance	Interest Balance	Latest Payment Amoun	Latest Payment Date	<30	30	60	90	120	180	>180	Escrow Delinquency	Total Delinquency	Days Past Due	Periods Missed
Stafford Serviced Loan Liabilit	Santana Holdings LLC*	3003000009	Oct 10, 2023	$ 50,000.00	$ 46,332.37	$ 461.61	$ 6,296.86	$ 1,500.00	May 1, 2024	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0	0
Stafford Serviced Loan Liabilit	Embry Mill Primary and Urgent Ca	3003000005	Jul 18, 2022	$ 108,000.00	$ 45,469.16	$ 200.12		$ 2,001.19	March 24, 2026	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	< 30	0
Stafford Serviced Loan Liabilit	Embry Mill 2	3003000010	Oct 16, 2023	$ 50,000.00	$ 32,792.37	$ 102.58		$ 1,025.83	March 24, 2026	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	< 30	0
Stafford Serviced Loan Liabilit	Next Level Mosaic, LLC**	3003000008	Jul 20, 2023	$ 151,000.00	$ 142,250.55	$ 438.67	$ 1,584.12	$ 1,935.00	February 2, 2026	$ 1,935.00	$ 1,935.00	$ 1,935.00	########	$ -	$ -	$ -	$ -	$ 7,740.00	90 +	3
Stafford Serviced Loan Liabilit	ACE Flight Solutions	3003000002	Jul 9, 2021	$ 45,000.00	$ 3,246.65	$ 41.69	$ -	$ 833.83	March 2, 2026	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0	0
			Totals	**$ 404,000.00**	**$ 270,091.10**	**$ 1,244.67**	**$ 7,880.98**			**$1,935.00**	**$1,935.00**	**$1,935.00**	**$1,935.00**					**$7,740.00**		

*Charged off as of 12/13/2024
**Placed in Collections 3/20/2026

8B

EDA STAFFORD Virginia

Wednesday, March 11, 2026

Community-Based Organization Support Program Application

The Stafford County Economic Development Authority (SCEDA) is pleased to announce the launch of the Community-Based Organizations (CBO) Support Program. This program is designed to empower local nonprofit organizations that align with SCEDA's mission and vision in promoting economic growth and enhancing the quality of life in Stafford County.

Grant Objectives:

The primary objectives of the CBO Grant Program are as follows:

- To provide financial support to community-based organizations that contribute to economic growth and community development within Stafford County.
- To create and retain quality jobs, foster a sense of community, and generate opportunities for the local workforce through CBO initiatives.
- To align with SCEDA's mission of attracting new businesses, retaining existing businesses, and championing forward-looking initiatives for sustainable growth.

Eligibility Criteria:

- **Must** be a registered non-profit organization or public entity operating within Stafford County.
- **Must** demonstrate a clear alignment with SCEDA's mission and vision as outlined earlier.
- **Must** present a well-defined project proposal that addresses a specific opportunity, problem, or need in the Stafford Community.
- **Must** detail the impact of the project on tax revenue generation, job creation, quality-of-life, and retention of local businesses.

Additional Information:

- Grant recipients will be required to submit periodic progress reports detailing the implementation status, project outcomes, and financial expenditures. SCEDA will monitor the projects to ensure their successful completion within the agreed-upon timeline and objectives.
- The application must be submitted by the 15th of the current month for consideration by the EDA at the following month's SCEDA meeting. For example, the complete application must be received by April 15 to be included for consideration at the May SCEDA meeting.

Applicant Information

Organization Name: The Healing Station Counseling Center

Federal Employer Identification Number (FEIN): 882320015

Organization Address: 410 Deacon Road

Zip Code: 22405

Main Point of Contact Name: Dr. Denise Willis

POC Phone Number: (540) 681-1924

POC Email Address: info@thehealingstationva.org

Project Title: Behavior Health Workforce Development

$ Amount Requested: $10,000

Project Start Date: Wednesday, July 1, 2026

Project End Date: Wednesday, June 30, 2027

Detail the opportunity for which Stafford EDA grant funds are being requested:

Existing inequities in access to behavioral healthcare resources negatively impact individuals, families, and communities' quality of life in Stafford county. Extended waiting periods for service and untreated mental health issues can result in enduring harmful consequences. Deficits in representation for people of color in the behavioral healthcare workforce reduces the number of black and brown individuals that seek treatment. THS is dedicated to establishing a strong mental health workforce with training and internships to address these inequities and expand services to meet the needs of our community.

Explain how the opportunity, problem, or need relates to the overall mission and/or vision of the Stafford EDA:

The opportunity addressed by The Healing Station Counseling Center's Workforce Development Program directly aligns with the Stafford County Economic Development Authority's mission to strengthen the local economy by supporting workforce development, improving quality of life, and fostering sustainable community growth.

Stafford County and the surrounding Planning District 16 region are experiencing rapid population growth while simultaneously facing a significant shortage of licensed behavioral health professionals. This workforce gap creates barriers to mental health care access and places additional strain on families, schools, employers, and healthcare systems. Addressing behavioral health needs is increasingly recognized as an important component of economic stability, workforce productivity, and community well-being.

The Healing Station's Workforce Development Program helps address this challenge by training graduate-level counseling interns and Residents-in-Counseling, providing them with supervised clinical experience and preparing them for professional licensure in Virginia. By developing a pipeline of skilled behavioral health professionals who can live and work within the region, the program strengthens the local workforce while expanding access to essential mental health services.

This initiative contributes to Stafford County's long-term economic vitality by supporting workforce readiness, improving employee wellness, and enhancing the overall quality of life for residents, key priorities that align with the Stafford EDA's vision for a thriving and resilient community.

Identify how employment opportunities will be created or retained, and describe the types of positions and any training programs involved:

The Healing Station Counseling Center's Workforce Development Program is designed to address the critical shortage of behavioral health professionals in the Stafford County and Planning District 16 region while simultaneously creating sustainable employment pathways in the mental health sector.

Through our Clinical Training Program, The Healing Station provides structured supervision, mentorship, and hands-on clinical experience for graduate-level counseling interns and Residents-in-Counseling who are completing licensure requirements in Virginia. Participants receive training in trauma-informed care, culturally responsive counseling, ethical practice, crisis response, and community-based behavioral health services.

The program creates a direct pipeline to employment by preparing participants for positions such as Licensed Professional Counselors (LPC), Resident Counselors, Behavioral Health Clinicians, Case Managers, and Program Coordinators. Many trainees are retained within the region following licensure, strengthening the local behavioral health workforce and increasing access to care for Stafford County residents.

As the program expands, The Healing Station anticipates creating and sustaining multiple professional positions including clinical supervisors, licensed therapists, program administrators, and support staff. By combining workforce training with community-based service delivery, this initiative not only develops skilled professionals but also contributes to local job creation, economic stability, and improved health outcomes across the region.

Explain how the project activities directly address the identified opportunity, problem, or need for the Stafford community:

The Healing Station Counseling Center's Workforce Development Program directly addresses the growing behavioral health workforce shortage and increasing demand for mental health services in Stafford County and the surrounding Planning District 16 region. As the county continues to experience significant population growth, many residents face barriers to accessing mental health care due to a limited number of licensed providers, long wait times for services, and affordability challenges.

This project responds to these needs by expanding The Healing Station's Clinical Training Program, which provides structured supervision, mentorship, and hands-on clinical experience for graduate-level counseling interns and Residents-in-Counseling who are completing their licensure requirements in Virginia. Participants receive training in trauma-informed care, culturally responsive counseling, crisis response, and ethical clinical practice while delivering supervised counseling services to individuals and families in the community.

Through this model, the program simultaneously expands access to affordable mental health care while building a sustainable pipeline of behavioral health professionals who are prepared to serve in Stafford County and the broader region. By strengthening the local workforce and increasing the availability of behavioral health services, this project helps improve community wellness, support local families, and contribute to a healthier and more resilient Stafford community.

Provide any additional narrative to the amount of funds sought and how they will fit into the overall mission of the Stafford EDA:

The Healing Station Counseling Center respectfully requests $10,000 from the Stafford County Economic Development Authority to support the expansion of our Workforce Development Program, which is designed to address the critical shortage of behavioral health professionals serving Stafford County and the surrounding region. These funds will directly support the training and supervision of graduate-level counseling interns and Residents-in-Counseling who are completing licensure requirements in Virginia.

Specifically, the requested funding will help offset costs associated with clinical supervision, professional training resources, program administration, and operational support necessary to provide high-quality, supervised clinical experience. This investment enables participants to gain the practical skills and hours required for licensure while delivering supervised counseling services that expand access to care for Stafford residents.

This funding aligns closely with the Stafford EDA's mission to strengthen the local workforce, support job creation, and enhance community assets that contribute to long-term economic vitality. By investing in behavioral health workforce development, the EDA will help build a sustainable pipeline of skilled professionals who can live, work, and serve in Stafford County, improving both community well-being and economic resilience.

Describe the impact of this award and completion of the project, as a whole, on Stafford County's ability to remain competitive, add additional "community" assets, and create or retain quality jobs:

The Healing Station Counseling Center's Workforce Development Program will strengthen Stafford County's ability to remain competitive by addressing one of the region's most pressing workforce challenges and the shortage of behavioral health professionals. As Stafford continues to grow, access to quality mental health services is increasingly recognized as essential to maintaining a healthy, productive workforce and an attractive environment for businesses and families.

This award will support the expansion of The Healing Station's Clinical Training Program, which prepares graduate-level counseling interns and Residents-in-Counseling for professional licensure in Virginia. By developing a local pipeline of behavioral health professionals, the program helps retain skilled clinicians in the region while creating new employment opportunities such as Licensed Professional Counselors, clinical supervisors, behavioral health clinicians, and program support staff.

In addition to job creation, the program adds an important community asset by expanding access to affordable mental health services for Stafford residents. Strengthening the behavioral health infrastructure enhances community wellness, supports employee productivity, and contributes to a higher quality of life key factors that help Stafford County attract and retain businesses, talent, and long-term economic growth.

Describe the project timeline and how you will ensure successful completion within the necessary timeframe, including a detailed timeline:

The Healing Station Counseling Center will implement the Workforce Development Program expansion over a 12-month period, ensuring that training, supervision, and service delivery milestones are completed within the required timeframe. The organization has an established clinical infrastructure, licensed leadership, and an operational training program already in place, allowing the project to begin immediately upon award.

Month 1–2: Program Preparation and Recruitment
During the initial phase, The Healing Station will finalize program logistics, recruit graduate-level counseling interns and Residents-in-Counseling, and confirm clinical supervision schedules. Partnerships with local universities and counseling programs will be utilized to identify qualified participants.

Month 3–4: Orientation and Training
Participants will complete orientation and professional development training, including trauma-informed care, ethical practice, culturally responsive counseling, and community-based behavioral health service delivery.

Month 5–10: Supervised Clinical Practice
Interns and residents will provide supervised counseling services to Stafford County residents while completing required clinical hours for licensure. Ongoing supervision, mentorship, and skill development will occur throughout this phase.

Month 11–12: Evaluation and Workforce Placement
Program outcomes will be evaluated, including the number of clients served, training hours completed, and workforce placements. Graduates will be supported in securing employment opportunities within the region.

Through structured oversight, licensed supervision, and established academic partnerships, The Healing Station will ensure the successful and timely completion of the project while strengthening the behavioral health workforce serving Stafford County.

Include additional background information regarding the managers, and/or Board of the organization, and specific information about the skills and experiences related to the successful management of the proposed project:

The Healing Station Counseling Center is guided by a strong leadership team and governing board with extensive experience in counseling, nonprofit management, community engagement, and workforce development. This collective expertise provides the organizational capacity necessary to successfully implement and manage the proposed Workforce Development Program.

Dr. Denise L. Willis, Executive Director, is a Licensed Professional Counselor with more than three decades of federal leadership experience prior to founding The Healing Station Counseling Center in 2022. In addition to her professional counseling credentials, Dr. Willis holds a Master's degree in Clinical Mental Health Counseling and a Doctorate in Christian Counseling. She has successfully developed and implemented The Healing Station's Clinical Training Program, which provides supervised clinical experience for graduate-level interns and Residents-in-Counseling while expanding access to mental health services for underserved populations. Her leadership has helped establish strong partnerships with local schools, healthcare providers, faith-based organizations, and community agencies throughout the region.

The organization's Board of Directors (Dr. Sabrina St. Clair, Dana Scott, SGT Steven Curtis) includes experienced professionals from diverse sectors, including government, business, ministry, and community leadership. Board members provide strategic oversight, financial stewardship, and governance support to ensure the organization operates effectively and responsibly. Their collective experience in organizational leadership, program development, and community engagement strengthens the organization's ability to successfully manage grant-funded initiatives.

In addition, Bishop Ron D. Willis, Director of Community Care, brings extensive executive leadership experience from military service, federal government leadership, and private-sector consulting. His expertise in strategic planning, program development, and community partnership building has been instrumental in expanding The Healing Station's visibility and collaborative relationships across Stafford County and the broader region.

Together, the leadership team and Board provide the professional expertise, operational oversight, and community partnerships necessary to ensure the successful implementation and long-term sustainability of the proposed workforce development project.

Signature & Consent

I hereby certify that, to the best of my knowledge, the provided information is true and accurate. I also attest that I have authorization to request funding on behalf of the applicant organization.

Signature Denise L. Willis

The Healing Station

Community Mental Health Counseling Center

Dr. Denise L. Willis, LPC — Executive Director

Essential Statistics

1 **Provider Shortage**: The Fredericksburg region faces severe provider-to-client ratios, with as many as 960 to 2,130 residents per behavioral health provider in surrounding counties. This means individuals often face long wait times or must travel outside the region for care.

2 **Youth Access Crisis**: Virginia ranks 48th in the nation for youth mental health access, with schools and emergency departments often serving as first responders to crises instead of community providers.

3 **Cost Barriers**: More than one in five adults in Virginia report being unable to access therapy due to cost. Locally, uninsured and underinsured residents are disproportionately impacted, leaving many without any form of care.

4 **Rising Demand**: Calls to the 988 Suicide & Crisis Hotline increased by more than 150% from 2022–2024, highlighting an urgent need for accessible, community-based counseling and support.

Local data from the 2025 Community Health Assessment (CHA) conducted by Mary Washington Healthcare and the Rappahannock Area Health District clearly shows that **mental health is the top community health priority**, named by over 56% of survey respondents. Despite this overwhelming concern, there are critical gaps:

Background

The Healing Station Counseling Center is a 501(c)(3) nonprofit organization dedicated to providing accessible outpatient mental health counseling services to individuals and families in the Fredericksburg and Stafford County region. All services are provided by appointment to ensure personalized, client-centered care.

Founded in October 2022, The Healing Station serves individuals, couples, teens, children, and families seeking compassionate, professional mental health support. Counseling sessions are offered on a **suggested donation basis of $40 per session**, comparable to a typical insurance co-pay. In keeping with our mission to remove barriers to care, **no client is ever turned away due to an inability to pay**.

The majority of those we serve face significant financial barriers to accessing traditional mental health services. Approximately **95% of our clients meet ALICE (Asset Limited, Income Constrained, Employed), low-income, or unemployed criteria**, highlighting the critical need for affordable behavioral health services within our community.

Client intakes: 203 total, 46 currently active

Client profile: Caucasian ~48%, African American ~49%, Hispanic ~3%; Veterans: 18, Military Dependents: 14

Staffing: Executive Director (Doctorate in Christian Counseling and LPC), Director of Community Care, 2 LPCs, Resident in Counseling, Counseling Interns, and Office Administrator

Program Overview

Right Help Right Now — Access & Training

Program Focus

- Provide affordable behavioral health services to uninsured and underserved across Planning District 16 (PD16).
- Clinical training program for master's-level interns/residents with weekly clinical supervision, direct client contact, CEU opportunities, and targeted skills workshops.
- Build strategic partnerships with local schools, healthcare providers, faith-based organizations, nonprofit agencies, law enforcement, and civic leaders to create a coordinated network of support for individuals and families experiencing behavioral health challenges.

Accomplishments

- Conducted over 2,300 client sessions to date
- Forged multiple community partnerships to expand referrals and supports
- Invested in workforce development through intern/resident training
- Recognized by Fredericksburg Chamber of Commerce as a 2025 Emerging Business
- THS Executive Director received the 2025 Central Virginia Most Influential Women's Award for mental health advocacy
- THS resident received the 2025 Presidential Lifetime Achievement award for mental health advocacy
- THS counselor received the 2025 PD16 Legacy Builders – Men of Impact for mental health
- THS Executive Director received 2025 Social Impact Award from the Virginia Black Chamber of Commerce
- Recognized as the 2026 Community Trailblazer by Global Business Women Inc.

Partnerships, Memberships & Academia Affiliations

Community Partnerships

Mary Washington Healthcare

racsb

ATLANTIC BUILDERS

FAHASS

VISION COMMUNITY CHURCH

PINNACLE TREATMENT CENTERS

VAHealth

STAFFORD PRINTING

CASA in Virginia

SimVentions

ACT Enough, Inc. Advocacy-Collaboration-Transformation

Comfort Heating & Cooling

CHOICES WOMEN'S CENTER

Memberships

AACC

American Counseling Association

VABCC

Fredericksburg Regional Continuum of Care

Fredericksburg Regional Chamber of Commerce

Academia Affiliations

Liberty University

DTS Dallas Theological Seminary

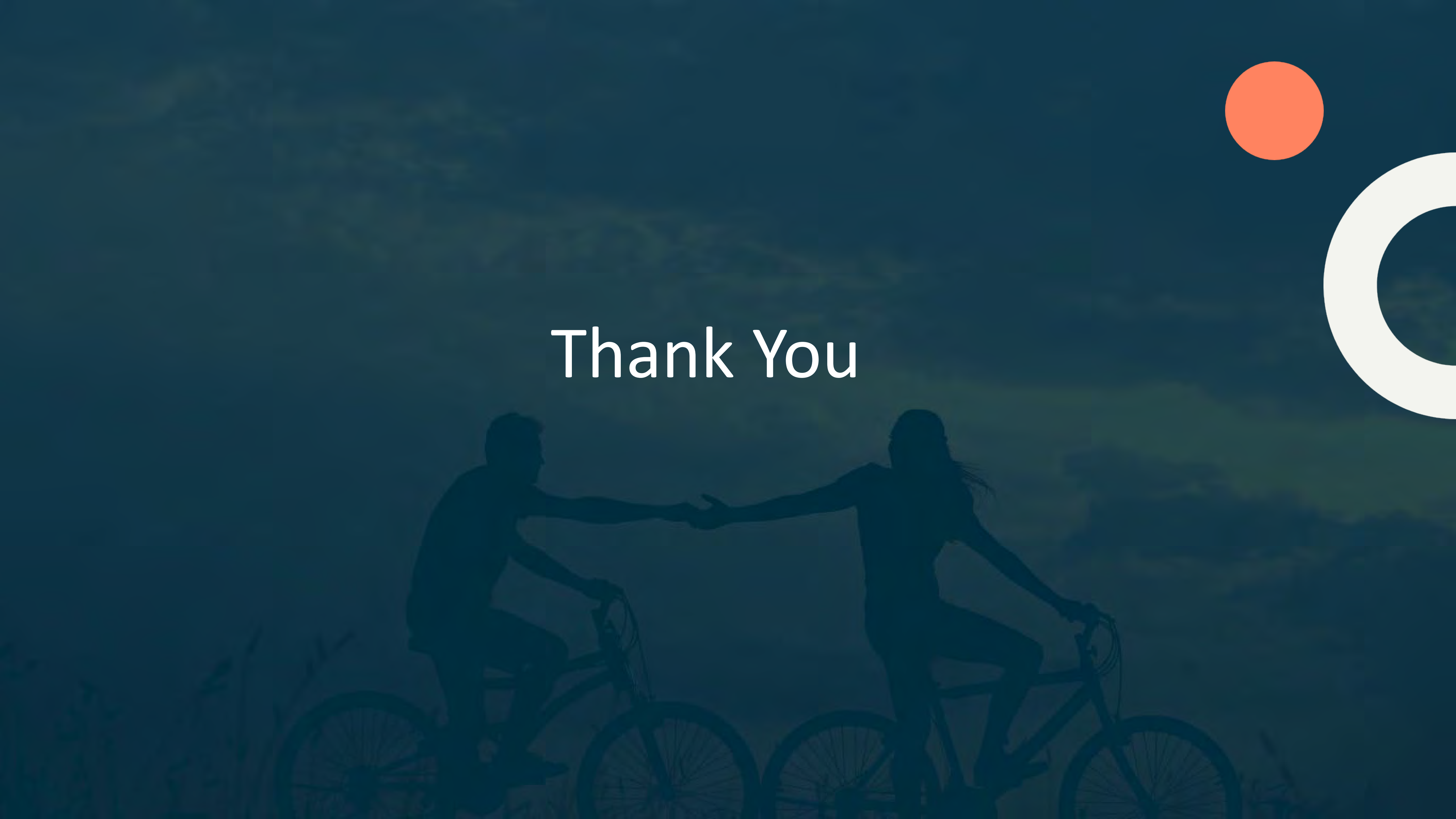
Walden University

Community Outreach Events

- Stafford County Public Schools Health Fair
- Fredericksburg Area Health and Support Services (FAHASS) Community Connections Expo (ALICE population)
- Mary Washington Health and Wellness Expo
- National Coalition of Negro Women Health Fair
- Mental Health America Fredericksburg Annual Walk for Mental Wellness
- National Night Out (NNO) – Stafford
- FailSafe-ERA Teens Workshops
- Other Community Organizations/Businesses

2026 Program Objectives

- Increase client intakes
- Expand clinical training program to cover exam preparation and application fees
- Extend marketing campaign and community advertisement
- Expand Community Partnerships
- Increase staff (bi-lingual counselor)
- Research grant and community funding opportunities
- Explore insurance paneling (Medicaid, Private insurance carriers)
- Host THS Fundraiser Gala (October 17th)


Thank You

Page left intentionally blank.

9C

To: Stafford County Economic Development Authority (EDA)

From: Savannah Wimbush, Business Development Manager and EDA Business Resources Committee (BRC) Staff Liaison

Cc: Liz Barber, Director

Date: April 10th, 2026

RE: *Virginia Alliance for Business, Commerce and Communities Foundation*'s CBO Application for *The VABCC Business Advocacy, Leadership & Economic Empowerment Initiative*

Dear Members of the EDA Board,

While closing out the Virginia Black Chamber of Commerce's grant application that was previously approved in February, it came to my attention that although the grant application was approved with the stipulation that $25,000 be split into two (2) $12,500 payments over the two-year project period, the actual project period on their application is January 1, 2026 through December 31, 2026.

I notified BRC member Weedeman and he subsequently reached out to Chairman Rowley. Based on that discussion, The Virginia Black Chamber of Commerce was advised that they may remit an invoice for the first $12,500, with the understanding that the discrepancy would be brought forward for Board review.

This memo is provided to ensure the Board is aware of the inconsistency between the approved award structure and the documented project timeline. Clarification from the Board is requested regarding how to proceed with the administration of the remaining funds associated with this grant.

Thank you,

Savannah Wimbush
Business Development Manager
Stafford County Economic Development & Tourism

10A

ENTIRE SLIDESHOW IS ADD-ON ITEM

Morgan Stanley

Mary Washington Healthcare

Series 2026 Financing Overview

April 10, 2026

Mary Washington Healthcare Series 2026 Financing Overview

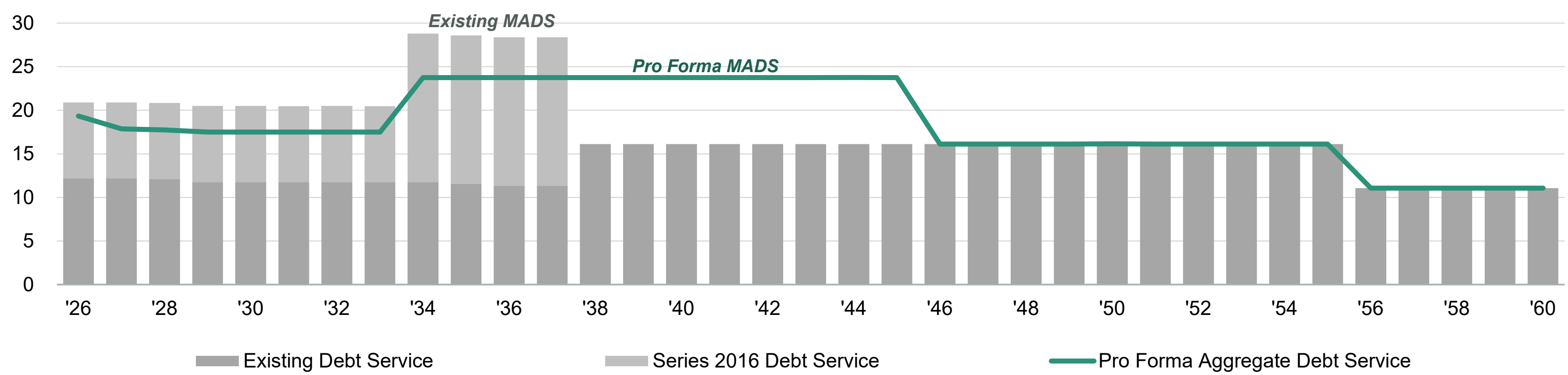
Preliminary, Subject to Change and Subject to Market Conditions

Financing Summary

- Mary Washington Healthcare (“MWHC”) has $96,940,000 of Series 2016 Bonds that are currently callable as of March 17, 2026
- A matched maturity refunding of the Series 2016 Bonds is producing savings in the current market
- MWHC is considering a re-amortization of the refunding bonds with a longer average life that corresponds with the underlying assets being refinanced
  - Provides the opportunity to reduce maximum annual debt service (MADS) and achieve cash flow savings in early years, as shown in the chart below
- The current structure contemplates the bonds being sold through a direct purchase transaction
- The refunding and contemplated structure is subject to market conditions and will be monitored by Mary Washington Healthcare and Kaufman Hall
- No new money debt will be issued as part of the financing

Pro Forma Annual Debt Service

$ millions; Aligned to Fiscal Year End



Notes:
1. Debt Service includes unrefunded Series 2016 bonds (6/15/2026 maturity), Series 2025A1, Series 2025A2, Series 2020 Loan, Note 2019 -1 and Capital Leases as of Series 2025A Official Statement

Morgan Stanley

APPENDIX

Disclaimers

Municipal Advisor Rule Disclosure

(a) Morgan Stanley & Co. LLC ("Morgan Stanley") is not acting as an advisor to you and does not owe a fiduciary duty pursuant to Section 15B of the Exchange Act to you with respect to the information and material contained in this communication; (b) Morgan Stanley is acting for its own interests; (c) you should discuss any information and material contained in this communication with any and all internal or external advisors and experts that you deem appropriate before acting on this information or material; and (d) Morgan Stanley seeks to serve as an underwriter on a future transaction and not as a financial advisor or municipal advisor. The information provided is for discussion purposes only in anticipation of serving as underwriter. The primary role of an underwriter is to purchase securities with a view to distribution in an arm's-length commercial transaction with the issuer. The underwriter has financial and other interests that differ from those of the issuer and obligated persons.

Any non-historical interest rates used herein are hypothetical and take into consideration conditions in today's market and other factual information such as the issuer's or obligated person's credit rating, geographic location and market sector. As such, these rates should not be viewed as rates that Morgan Stanley guarantees to achieve for the transaction. Any information about interest rates and terms for SLGS is based on current publicly available information and treasury or agency rates for open-market escrows are based on current market interest rates for these types of credits and should not be seen as costs or rates that Morgan Stanley guarantees to achieve for the transaction.

Disclaimer

This material was prepared by sales, trading, banking or other non-research personnel of one of the following: Morgan Stanley & Co. LLC, Morgan Stanley & Co. International plc, Morgan Stanley MUFG Securities Co., Ltd., Morgan Stanley Capital Group Inc. and/or Morgan Stanley Asia Limited (together with their affiliates, hereinafter “Morgan Stanley”). Unless otherwise indicated, the views herein (if any) are the author’s and may differ from those of the Morgan Stanley Research Department or others in the Firm. This information should be treated as confidential and is being delivered to sophisticated prospective investors in order to assist them in determining whether they have an interest in the type of instruments described herein and is solely for internal use.

This material does not provide investment advice or offer tax, regulatory, accounting or legal advice. By submitting this document to you, Morgan Stanley is not advising you to take any particular action based on the information, opinions or views contained in this document, and acceptance of such document will be deemed by you acceptance of these conclusions. You should consult with your own municipal, financial, accounting and legal advisors regarding the information, opinions or views contained in this document. Unless stated otherwise, the material contained herein has not been based on a consideration of any individual client circumstances and as such should not be considered to be a personal recommendation. This material was not intended or written to be used, and it cannot be used by any taxpayer, for the purpose of avoiding penalties that may be imposed on the taxpayer under U.S. federal tax laws. Each taxpayer should seek advice based on the taxpayer’s particular circumstances from an independent tax advisor.

This material has been prepared for information purposes only and is not a solicitation of any offer to buy or sell any security, commodity, futures contract or instrument or related derivative (hereinafter “instrument”) or to participate in any trading strategy. Any such offer would be made only after a prospective participant had completed its own independent investigation of the instrument or trading strategy and received all information it required to make its own investment decision, including, where applicable, a review of any prospectus, prospectus supplement, offering circular or memorandum describing such instrument or trading strategy. That information would supersede this material and contain information not contained herein and to which prospective participants are referred. If this material is being distributed in connection with or in advance of the issuance of asset backed securities, information herein regarding any assets backing any such securities supersedes all prior information regarding such assets. Unless otherwise specifically indicated, all information in these materials with respect to any third party entity not affiliated with Morgan Stanley has been provided by, and is the sole responsibility of, such third party and has not been independently verified by Morgan Stanley or its affiliates or any other independent third party. We have no obligation to tell you when information herein is stale or may change. We make no express or implied representation or warranty with respect to the accuracy or completeness of this material, nor are we obligated to provide updated information on the instruments mentioned herein. Further, we disclaim any and all liability relating to this material.

To the extent any prices or price levels are noted, they are for informational purposes only and are not intended for use by third parties, and are indicative as of the date shown and are not a commitment by Morgan Stanley to trade at any price.

This material may have been prepared by or in conjunction with Morgan Stanley trading desks that may deal as principal in or own or act as market maker or liquidity provider for the instruments or issuers mentioned herein and may also seek to advise issuers of such instruments. Where you provide us with information relating to your order or proposed transaction ("Information"), we may use that Information to facilitate the execution of your orders or transactions, in managing our market making, other counterparty facilitation activities or otherwise in carrying out our legitimate business (which may include, but is not limited to, hedging a risk or otherwise limiting the risks to which we are exposed). Counterparty facilitation activities may include, without limitation, us taking a principal position in relation to providing counterparties with quotes or as part of the ongoing management of inventories used to facilitate counterparties. Where we commit our capital in relation to either ongoing management of inventories used to facilitate clients, or in relation to providing you with quotes we may make use of that information to enter into transactions that subsequently enable us to facilitate clients on terms that are competitive in the prevailing market conditions. Trading desk materials are not independent of the proprietary interests of Morgan Stanley, which may conflict with your interests. Morgan Stanley may also perform or seek to perform investment banking services for the issuers of instruments mentioned herein.

Any securities referred to in this material may not have been registered under the U.S. Securities Act of 1933, as amended, and, if not, may not be offered or sold absent an exemption therefrom. In relation to any member state of the European Economic Area, a prospectus may not have been published pursuant to measures implementing the Prospectus Directive (2003/71/EC) and any securities referred to herein may not be offered in circumstances that would require such publication. Recipients are required to comply with any legal or contractual restrictions on their purchase, holding, sale, exercise of rights or performance of obligations under any instrument or otherwise applicable to any transaction. In addition, a secondary market may not exist for certain of the instruments referenced herein.

The securities, commodities, futures or other instruments (or related derivatives) discussed in this material may not be suitable or appropriate for all investors. This material has been prepared and issued by Morgan Stanley for distribution to market professionals and institutional investor clients only. This material does not provide individually tailored investment advice or offer tax, regulatory, accounting or legal advice. Prior to entering into any proposed transaction, recipients should determine, in consultation with their own investment, legal, tax, regulatory and accounting advisors, the economic risks and merits, as well as the legal, tax, regulatory and accounting characteristics and consequences, of the transaction. You should consider this material among other factors in making an investment decision.

Options and futures are not for everyone. Before purchasing or writing options, investors should understand the nature and extent of their rights and obligations and be aware of the risks involved, including the risks pertaining to the business and financial condition of the issuer and the underlying instrument. For Morgan Stanley customers who are purchasing or writing exchange-traded options, please review the publication ‘Characteristics and Risks of Standardized Options,’ which is available from your account representative.

Disclaimer

The value of and income from investments may vary because of changes in interest rates, foreign exchange rates, default rates, prepayment rates, securities, prices of instruments or securities, market indexes, operational or financial conditions of companies or other factors. There may be time limitations on the exercise of options or other rights in instruments (or related derivatives) transactions. Past performance is not necessarily a guide to future performance. Estimates of future performance are based on assumptions that may not be realized. Actual events may differ from those assumed and changes to any assumptions may have a material impact on any projections or estimates. Other events not taken into account may occur and may significantly affect the projections or estimates. Certain assumptions may have been made for modeling purposes only to simplify the presentation and/or calculation of any projections or estimates, and Morgan Stanley does not represent that any such assumptions will reflect actual future events or that all assumptions have been considered or stated. Accordingly, there can be no assurance that estimated returns or projections will be realized or that actual returns or performance results will not materially differ from those estimated herein. Some of the information contained in this document may be aggregated data of transactions executed by Morgan Stanley that has been compiled so as not to identify the underlying transactions of any particular customer.

Notwithstanding anything herein to the contrary, Morgan Stanley and each recipient hereof agree that they (and their employees, representatives, and other agents) may disclose to any and all persons, without limitation of any kind from the commencement of discussions, the U.S. federal and state income tax treatment and tax structure of the transaction and all materials of any kind (including opinions or other tax analyses) that are provided to it relating to the tax treatment and tax structure. For this purpose, "tax structure" is limited to facts relevant to the U.S. federal and state income tax treatment of the transaction and does not include information relating to the identity of the parties, their affiliates, agents or advisors

This information is not intended to be provided to and may not be used by any person or entity in any jurisdiction where the provision or use thereof would be contrary to applicable laws, rules or regulations.

This communication is directed in the UK to those persons who are eligible counterparties or professional clients and must not be acted on or relied upon by retail clients (each as defined in the UK Financial Services Authority's rules).

This information is being disseminated in Hong Kong by Morgan Stanley Asia Limited and is intended for professional investors (as defined in the Securities and Futures Ordinance) and is not directed at the public of Hong Kong.

This information is being disseminated in Singapore by Morgan Stanley Asia (Singapore) Pte. This information has not been registered as a prospectus with the Monetary Authority of Singapore. Accordingly, this information and any other document or material in connection with the offer or sale, or invitation for subscription or purchase, of this security may not be circulated or distributed, nor may this security be offered or sold, or be made the subject of an invitation for subscription or purchase, whether directly or indirectly, to persons in Singapore other than (i) to an institutional investor under Section 274 of the Securities and Futures Act, Chapter 289 of Singapore (the "SFA"), (ii) to a relevant person pursuant to Section 275(1) of the SFA, or any person pursuant to Section 275(1A) of the SFA, and in accordance with the conditions, specified in Section 275 of the SFA or (iii) otherwise pursuant to, and in accordance with the conditions of, any other applicable provision of the SFA. Any offering of this security in Singapore would be through Morgan Stanley Asia (Singapore) Pte, an entity regulated by the Monetary Authority of Singapore.

This information is being disseminated in Japan by Morgan Stanley MUFG Securities Co., Ltd., Any securities referred to herein may not have been and/or will not be registered under the Financial Instruments Exchange Law of Japan (Law No. 25 of 1948, as amended, hereinafter referred to as the "**Financial Instruments Exchange Law of Japan**"). Such securities may not be offered, sold or transferred, directly or indirectly, to or for the benefit of any resident of Japan unless pursuant to an exemption from the registration requirements of, and otherwise in compliance with the Financial Instruments Exchange Law and other relevant laws and regulations of Japan. As used in this paragraph, "resident of Japan" means any person resident in Japan, including any corporation or other entity organized or engaged in business under the laws of Japan. If you reside in Japan, please contact Morgan Stanley MUFG Securities for further details at +613-5424-5000.

This information is distributed in Australia by Morgan Stanley Australia Limited A.B.N. 67 003 734 576, holder of Australian financial services license No. 233742, which accepts responsibility for its contents, and arranges for it to be provided to potential clients. In Australia, this report, and any access to it, is intended only for "wholesale clients" within the meaning of the Australian Corporations Act.

For additional information, research reports and important disclosures see https://secure.ms.com/servlet/cls. The trademarks and service marks contained herein are the property of their respective owners. Third-party data providers make no warranties or representations of any kind relating to the accuracy, completeness, or timeliness of the data they provide and shall not have liability for any damages of any kind relating to such data.

This material may not be redistributed without the prior written consent of Morgan Stanley.

Page left intentionally blank.

10B

2025 ECONOMIC SUMMIT REPORT

Prepared for the City of Alexandria and the Alexandria Economic Development Partnership

JULY 2025

Summit Overview

On May 8, from 3:00 to 7:00 p.m. at the Westin Alexandria, the City of Alexandria, in partnership with the Alexandria Economic Development Partnership (AEDP), hosted the 2025 Economic Summit, a dynamic and successful event designed to inform, inspire, and engage a diverse cross-section of the community. Held in a collaborative setting, the event brought together local business leaders, policymakers, residents, and other stakeholders to explore and discuss the City's economic successes and trajectory.

The event represents a significant milestone as Alexandria undertakes its first citywide economic strategy initiative in more than 15 years. The inaugural summit, held in 2007, was grounded in community engagement and proved instrumental in catalyzing major developments across the city including the reimagined waterfront, the former Landmark Mall, and Virginia Tech. Similarly, the primary aim of the 2025 summit was to facilitate open dialogue around Alexandria's economic future while gathering valuable input on a proposed strategic framework meant to guide the City's decision making regarding long-term economic development.

The summit featured a blend of presentations, panel discussions, and working breakout sessions. This format provided attendees insights into current economic trends and challenges, creating a basis for conversation before breaking out into smaller groups. Participants were encouraged to share their perspectives to help shape strategies that reflect the community's priorities. The event's structure was carefully crafted to not only deliver important information but also foster meaningful conversations and active participation. With over 200 individuals in attendance, the summit successfully met its goals of engaging the community and collecting critical feedback that will inform the next phase of Alexandria's economic planning.

ABOUT THIS REPORT

This report summarizes key conversations and feedback from summit attendees. While the observations and themes reflect participant insights, they represent a single component of a broader city analysis that includes wide-reaching stakeholder engagement and economic data collected over several months. The report does not offer final conclusions or definitive outcomes; rather, it captures the valuable perspectives and feedback shared during the event.

The information summarized in this report is part of a larger economic development strategic planning process co-led by TIP Strategies, an economic development consulting firm from Austin, Texas; the City of Alexandria; and the Alexandria Economic Development Partnership. The final deliverable will be a strategic framework that guides future decision-making about economic development initiatives in Alexandria.

Engagement Summary

The City of Alexandria, the Alexandria Economic Development Partnership, and TIP Strategies (TIP) launched their collaborative efforts to host an economic summit and develop a strategic framework to guide economic development in November 2024. The summit was the culmination of a robust community engagement process, preceded by several months of stakeholder engagement and data analysis.

To ensure the summit was informed by community input, and to get a better understanding of opportunities and challenges, the project team invited stakeholders to engage with TIP in several different formats over six months. These efforts, along with the summit attendance, reached over 840 community touchpoints. These meetings included over 75 individuals in group roundtables and one-on-one interviews, more than 35 participants in two pre-summit events, and 530 respondents in pre- and post-summit virtual surveys, as shown in Figure 1.

FIGURE 1. ENGAGEMENT SUMMARY

75+

ROUNDTABLE AND INTERVIEW ATTENDEES

Alexandria City Public Schools • Business Associations • Board and Commissions • City Council Civic Leadership • Community Members • Economic Development Organizations • Large Employers • Real Estate and Development • Small Businesses • Tourism • Workforce and Higher Education

35+

COUNTDOWN TO THE SUMMIT EVENT ATTENDEES

Economic Development, Commercial Uses, and Investment • Virtual Q&A

530

SURVEY RESPONDENTS

Pre- and Post-Summit Surveys

200+

SUMMIT ATTENDEES

840+

COMMUNITY TOUCHPOINTS

Concurrently with the stakeholder engagement, TIP prepared a preliminary data analysis that looked at point-in-time and trend information to better understand Alexandria's competitive position. This data analysis encompassed a wide range of topics including demographics, industry and occupation information, land use patterns, and fiscal position (Figure 2). The final analysis will be delivered as an interactive data visualization, with relevant findings incorporated in the strategic plan.

Insights from the stakeholder engagement and draft data analysis were then used to identify common themes and compile a strengths, weaknesses, opportunities, and threats (SWOT) analysis, which is summarized in Figure 3 (page 4). The SWOT analysis will refine and expand the draft strategic framework shown in Figure 4 (page 9). Areas of strength and opportunity will be leveraged in the final strategic framework and positioned to mitigate weaknesses or threats when possible.

FIGURE 2. DATA ANALYSIS SUMMARY

FIGURE 3. SWOT ANALYSIS

STRENGTHS

- High quality of life
- Sense of community
- Proximity to DC and other regional economic hubs
- Transportation infrastructure
- Waterfront
- Historic appeal and charm
- Strong tourism sector
- Small business community
- Unique neighborhoods
- Highly educated workforce
- Presence of and proximity to quality higher ed institutions
- Leader in office conversions
- AAA credit rating
- VA #1 state for business

WEAKNESSES

- Lack of light industrial sites
- Limited commercial real estate availability
- Over-reliance on residential in real estate tax revenues
- High office vacancy rates
- High cost of housing
- Constrained road networks
- Population growth slowing, some challenges retaining young professionals
- Workforce for skilled trades
- Underdeveloped entrepreneurial ecosystem

OPPORTUNITIES

- Office space reuse
- Expand tourism/entertainment assets
- Catalyst real estate redevelopment sites
- Regional collaboration, action, and impact
- Increase connectivity between neighborhoods
- Grow local entrepreneurship ecosystem and culture
- Reskill federal workforce
- Northern Virginia Community College
- Virginia Tech presence and growth

THREATS

- Changing administrations
- Impact of federal funding and workforce cuts
- Loss of federal and federal adjacent workers
- Tariffs
- Contracting office market
- Reduced consumer spending
- Decreasing population
- Brain drain

Source: TIP Strategies

Summit Program Highlights

The following sections highlight the themes, moments, and insights that emerged from the four-hour event and that will influence the rest of the planning process. Community residents, leaders, and invited speakers engaged in nuanced conversation that will shape the future trajectory of Alexandria's economy.

Setting the Stage

Opening Remarks and Panel Discussion

City of Alexandria Mayor Alyia Gaskins opened the summit by empowering participants to "unlock the potential in every part of our city," recognizing that Alexandria is at a pivotal inflection point, facing complex and overlapping challenges. From automation and artificial intelligence (AI) to federal spending shifts, climate change, and rising costs, the mayor spoke of the need for the city to respond to mounting pressure with clarity and courage. Considering these challenges, she stated that "every challenge is a call to action"—an invitation to innovate and collaborate. In fact, the mayor emphasized that the city's future depends on unlocking the creativity of small businesses, residents, and local entrepreneurs—by transforming obstacles into opportunities.

SPEAKER

Alyia Gaskins
Mayor, City of Alexandria

However, the mayor acknowledged that strategy without implementation is just talk. She highlighted past wins, such as the Virginia Tech Innovation Campus and the Landmark Mall transformation, which were achieved because the city had a well-defined playbook and a calculated way forward. Similarly, advancing the future of Alexandria today will require a resilient and transparent structure, not merely inspiration. To meet this moment, the mayor maintained that the City's next strategy must be inclusive, sustainable, holistic, and powered by partnerships that facilitate growth benefitting all residents, not just a few. She also asserted that future economic development efforts must build on and amplify Alexandria's unique place-based assets.

> *"Every challenge is a call to action—an invitation to innovate and collaborate."*

Mayor Gaskins went on to outline a set of priorities to guide Alexandria's path forward. She positioned the summit as the start of such efforts, an opportunity to have a future-forward conversation focused on emerging opportunities and challenges. She called for active collaboration in shaping a new, data-informed economic strategy, emphasizing the importance of residents, businesses, and city leaders working together to co-create a plan grounded in shared values and driven by analytics. The mayor also underscored the need to focus on catalytic projects and inclusive revitalization, urging the city to pursue bold opportunities that stimulate economic growth while uplifting underserved communities and neighborhoods.

Central to her vision is a strong focus on young people, with a call to prioritize education and workforce development efforts that foster upward mobility for the next generation. Mayor Gaskins stressed the importance of committing to long-term, equitable growth—not just quick wins—highlighting the need for strategies that support environmental health, affordability, and quality of life. She concluded by challenging the city to reject outdated models and embrace fresh thinking, community input, and innovative solutions, noting that approaches from 2007, when the first economic summit was held, are no longer sufficient to address the needs of today. In summary, her remarks reinforced the idea that "We're about making sure that we are building long-term value for our environment, for our residents, for our workforce, and for our tax base—holistically."

> *We're about making sure that we are building long-term value for our environment, for our residents, for our workforce, and for our tax base—holistically.*

A robust panel discussion followed Mayor Gaskins on the event agenda. Jon Roberts, Managing Partner of TIP, hosted a panel conversation entitled "Current Trends in Economic Development and Investment: Alexandria's Opportunity" with Stephanie Jennings, CBRE Research Director, Mid-Atlantic, and Meghan Welch,.Virginia Economic Development Partnership Vice President, Knowledge Work. The panel discussed emerging trends in economic development including real estate, AI, and changes to federal funding, along with the impacts of those trends at the state, regional, and local levels.

- **REAL ESTATE**. Much of the discussion addressed recent trends in the office real estate market, with a specific focus on vacancy rates. Nationally, office vacancy rates are at historic levels, with central business district markets hit the hardest. Within the DC metropolitan area and Northern Virginia, vacancy rates are higher than average, at about 22 percent. Vacancy rates are slightly lower in Alexandria at 21.1%, thanks, in part, to our conversion policies. Overall, office vacancy rates are expected to rise slightly or plateau in the foreseeable future as many companies utilize a hybrid work week with workers located both at home and in the office. Successful efforts to bring more workers into the office include what the panelists referred to as a “flight to quality” for office space whereby businesses offer workers onsite amenities in locations with high quality of life characteristics. This strategy is seen as particularly effective for recruiting the Gen Z workforce.

- **ARTIFICIAL INTELLIGENCE**. A comprehensive understanding of the impacts AI will have on businesses, workers, and the economy generally is still emerging. One clear impact is the growth in demand for data centers. Northern Virginia is a national leader in data centers due to the availability of fiber infrastructure, although there is an emerging trend of data centers locating in rural areas due to large real estate and utility requirements. In Alexandria, the AI advantage is likely aligned with businesses that are able to leverage this new technology for profit, rather than seeking data centers for which there are few (if any) suitable sites.
  Locally, a leading indicator of the impact of AI can be seen in the legal industry. Some industries have reported using AI to free workers for higher-order strategic planning and decision making, accelerate tasks, and become more competitive. In response to these trends, regional economic development organizations have begun working with partners to ensure the local workforce is ready to adapt to the changes AI will bring.
- **FEDERAL FUNDING**. Uncertainty around the availability of federal funding is a concern at the national, state, and local level. While reduced funding is often associated with job losses, it also presents an opportunity for Alexandria. As research, development, and innovation efforts are transferred from federally sponsored initiatives to the private sector, Alexandria could be well-positioned to recruit and foster the development of companies that work in this space. Panelists agreed that government spending overall is an important indicator of Alexandria’s economic future. Based on CBRE data, historically, when federal spending increased, the local economy grew even after federal job losses. Using past trends as a guide, if federal spending is reduced or maintained at status quo levels with a decrease in federal employment, the local economy is more likely to stagnate.

During concluding remarks, the panel discussed the importance of competitive communities operating with a future-forward approach that looks for emerging opportunities. Building on the mayor’s statement that “Every challenge is a call to action,” Alexandria should position itself for success by leveraging an educated and diverse workforce, maintaining quality of life amenities, and looking for ways that emerging technology can be applied to economic development efforts.

SPEAKERS

Jon Roberts
Managing Partner, TIP Strategies

Stephanie Jennings
Research Director,
Mid-Atlantic; CBRE

Meghan Welch
Vice President, Knowledge Work;
Virginia Economic Development
Partnership

Looking Forward

Key Findings and Strategic Framework

The presentation began with highlights from a robust data analysis and an overview of stakeholder engagement efforts conducted to date. Engagement included a series of group discussions, one-on-one interviews, and pre-summit activities designed to ensure diverse voices were heard throughout the planning process, including residents and the business community (see Figure 1, page 2). In addition, an overview of the results from the pre-summit survey offered valuable insights into community priorities, concerns, and perceptions.

The quantitative and qualitative insights were synthesized into a draft SWOT analysis to present the consulting team's current understanding of the City's economic landscape (see Figure 3, page 4). This community input—together with a data-driven economic analysis and proven strategies based on best practices and trends in economic development—informed the development of the draft strategic framework unveiled to summit participants.

The draft strategic framework (see Figure 4, page 9) presented during the summit included three primary components. The framework is organized under a vision statement that reflects a forward-looking, inclusive economic future for Alexandria. Under the vision are a set of guiding principles that outline the economic development values shaping the City's decision-making. The vision and the guiding principles influenced the creation of three goal areas focused on place-based development, business retention and recruitment, and entrepreneurship and innovation. These elements collectively form the foundation of a strategy designed to align the City's resources, policies, and partnerships in support of Alexandria's long-term economic success.

SPEAKERS

Tracye McDaniel
President, TIP Strategies

Jennifer Todd-Goynes
Senior Consultant, TIP Strategies

Mishka Parkins
Consultant, TIP Strategies

FIGURE 4. DRAFT STRATEGIC FRAMEWORK

FRAMEWORK VISION STATEMENT

Alexandria is a resilient, competitive, future-ready city where innovation thrives, opportunity is accessible to all, and economic growth enhances quality of life.

GUIDING PRINCIPLES

EQUITY
Prioritize initiatives that lead to equitable and inclusive outcomes and opportunities for residents.

RESILIENCE
Position Alexandria to grow a more diverse and resilient tax base that is financially sustainable over the long-term.

AUTHENTICITY
Honor Alexandria's diverse culture, character, and history while embracing place-based development.

ACCOUNTABILITY
Follow structured decision-making processes and share regular progress updates.

GOAL AREAS

PLACE-BASED DEVELOPMENT
Invest in dynamic, inclusive, and authentic places that reflect Alexandria's character and contribute to a diversified tax base.

BUSINESS RETENTION AND RECRUITMENT
Support local businesses and attract new companies to create an array of high-quality employment opportunities.

ENTREPRENEURSHIP AND INNOVATION
Facilitate a thriving ecosystem that supports local entrepreneurs, fosters innovation, and provides pathways for startups to succeed.

Inspiring Action

Keynote Address

During his keynote, Kevin Ervin Kelley explored what made certain places truly special and deeply valued by the people who use them. Through a series of case studies, leaning on national and international examples, he argued that places become exceptional not because of their size or cost, but because they evoke emotional connection and create a sense of belonging. By weaving together insights from architecture, urban design, psychology, and branding, Kelley demonstrated how meaningful places can be intentionally designed to foster community, identity, and shared experiences.

Leaning on the foundational themes of his book, *Irreplaceable: How to Create Extraordinary Places that Bring People Together*, Kelley outlined principles for shaping environments that go beyond function to offer emotional and sensory richness. He emphasized designing with purpose and authenticity, using storytelling and a deep understanding of human behavior to guide placemaking and placekeeping decisions. Key concepts from his presentation include the following.

- The spaces we occupy directly shape how we behave. Kelley emphasized that our environments influence our emotions, decisions, and social interactions—even in subtle ways we often overlook.
- The disappearance of "third places" is fueling social disconnection. With more people staying home and interacting online, traditional gathering spots like cafés, malls, and public spaces are vanishing, leaving communities and their residents more isolated and anxious.
- People are drawn to shared experiences that feel meaningful and communal. Whether it's a music festival or a grocery store with a strong cultural identity, spaces that foster a sense of ritual, belonging, and emotional resonance thrive.
- For people to engage with a place, the reward must feel greater than the effort required. Poor design, difficult parking, and a lack of wayfinding drive people away. Spaces must be easy to access and worth the journey.
- The most successful places reflect the values and identities of the people they serve. When communities and businesses design with authenticity and story—rooted in local culture and meaning—they attract deeper engagement and loyalty.

Through practical examples and clear strategies, Kelley's presentation called for specific groups to take a more thoughtful approach to curating places.

- City planners and community developers can strengthen positive association to places by giving neighborhoods names, crafting

SPEAKER

Kevin Ervin Kelley
Founding Partner & Principal,
Shook Kelley

KEY CONCEPTS

- The spaces we occupy directly shape how we behave.
- The disappearance of "third places" is fueling social disconnection.
- People are drawn to shared experiences that feel meaningful and communal.
- For people to engage with a place, the reward must feel greater than the effort required.
- The most successful places reflect the values and identities of the people they serve.

stories, and establishing symbolic "thresholds." These activities shift focus to connection rather than just commerce, ultimately building emotional attachment and pride, while inviting people to care for a place more deeply.

- Retailers and business owners should focus on creating community-oriented experiences, not just selling products. By designing environments that reflect shared values or cultures, establishments can become gathering spaces that foster loyalty and connection.
- Architects and designers should prioritize how a space makes people feel and behave over aesthetics or looks. Spaces should create "bonfire" experiences—experiences that invite people to linger, connect, and return—and should not be places that simply function as beautiful backdrops.

Ultimately, his remarks point to the opportunity—the need to provide entertainment, experiences, and destinations across Alexandria that honor and build on the city's identity while increasing its prosperity.

Launching a Community Dialogue

Breakout Sessions

Summit attendees were invited to participate in breakout sessions focused on one of the three draft goal areas, providing participants an opportunity to engage in focused, smaller-group discussions. A facilitator in each room guided the conversation, while a designated note taker captured key points and feedback. The discussions lasted approximately 40 minutes, after which all groups reconvened to share highlights from their sessions. This section shares outtakes from these discussions, which will be considered, along with other stakeholder engagement gathered throughout this process, in the preparation of the final strategic framework.

FIGURE 5. BREAKOUT OVERVIEW

3
small group sessions

1
session per goal area

~40
minutes of discussion, followed by report out from each group

Draft Goal 1. Place-Based Development

Invest in dynamic, inclusive, and authentic places that reflect Alexandria's character and contribute to a diversified tax base.

Strategies

1.1. Invest in catalytic real estate projects that contribute to sustained economic growth throughout the city.

1.2. Strengthen place-based initiatives that celebrate Alexandria's diverse neighborhoods, cultural identity, and heritage.

1.3. Ensure that land use policies are supportive of sustainable and innovative approaches to development.

1.4. Position the City as a destination of choice for regional and national visitors.

Discussion Summary

Initially, the place-based development discussion focused on the types of development summit attendees would like to see in Alexandria, and where that development might happen within the city. Maintaining Alexandria's historic character was a top priority for both existing and new development, ensuring that the city continues to be seen as an alternative to the more intense development and general busyness of Washington, DC. Discussion participants would like to see development with historic characteristics, landmark art that is reflective of local culture, and improved wayfinding to help both residents and visitors better understand how to access businesses, amenities, and parking.

Existing development provided a foundational touchpoint throughout the discussion, highlighting what is working well and what could be improved. Attendees prioritized reusing and repurposing real estate when possible and replicating the walkability, mixed-use, and transit access of Old Town in other areas of the city. Specifically, the West End was named as a good candidate for real estate investment or revitalization, for re-imagined streets that accommodate multi-modal transportation, and for building additional green space. Additional desired characteristics of new development included mixed-income housing, a variety of uses that are within walking distance from each other, new connections between activity hubs and with the waterfront, and a commitment to making future businesses and amenities easily accessible to a wide range of potential users.

The conversation about desired uses and locations evolved into a brainstorming session about potential additions to the current real estate landscape. Attendees advocated for an array of developments to include a museum, incubation space for emerging businesses, childcare that is co-located with major employers or made more accessible to the workforce, an arts and entertainment district with family-friendly activities, and facilities for youth sport tournaments. The arts and entertainment district and the youth sports facilities are closely tied to tourism and the need for additional hotel space to accommodate visitors.

GOAL 1. COMMUNITY PRIORITIES

- Land use policies should support sustainable and innovative development.
- Prioritize catalytic real estate projects.
- Focus on projects that improve quality of life and position Alexandria as a destination of choice.

Draft Goal 2. Business Retention and Recruitment

Support local businesses and attract new companies to create an array of high-quality employment opportunities.

Strategies

2.1. Support and grow Alexandria's existing businesses of all sizes.

2.2. Recruit businesses that align with Alexandria's target industries, workforce skills, assets, and economic vision.

2.3. Diversify the local economy by building on Alexandria's existing strengths and identifying future areas of opportunity.

2.4. Strengthen talent pipelines for existing and emerging industries.

Discussion Summary

Participants asked for more information and insight into Alexandria's target industries, along with transparency around who manages it and the rationale for each selection. The group agreed that industry targeting should be based on the city's competitive strengths, available talent, and alignment with emerging trends. Key sectors suggested included digital, cyber, and health technologies; energy; professional and scientific services; and mid-sized firms with around 1,000 employees. It was noted that Alexandria should focus on areas where it can distinguish itself from nearby jurisdictions, such as positioning itself as a technology hub. Suggested initiatives included hosting tech innovation events (with sponsorship and seed funding), supporting startups, and building talent pipelines through partnerships with Northern Virginia Community College (NVCC) and grant-funded programs.

When discussing the types of businesses Alexandria should attract, participants highlighted the importance of complementing existing industries and infrastructure. There was strong interest in businesses that could fill unmet local consumer needs—particularly those that residents currently leave the area to access. Stakeholders encouraged building on local assets such as the new hospital, major transit routes, and the city's diverse, immigrant-rich community. Opportunities in arts, entertainment, and culinary experiences were seen as pivotal areas of growth, with comparisons made to vibrant local destinations like Union Market in DC. Additionally, participants called for a focus on services tailored to Alexandria's aging population and greater efforts to attract global companies capable of investing in the city's priority sectors.

Business retention strategies centered on enhancing regulatory and infrastructure support, as well as cultivating a local workforce that is connected to viable career opportunities. The importance of career education and exposure for young people was a recurring theme, with strategic recommendations for career and technical education (CTE)

GOAL 2. COMMUNITY PRIORITIES

- Support locally owned businesses of all types.
- Recruit industries/businesses based on alignment with emerging trends and their ability to increase local tax revenue, diversify the economy, provide quality jobs, and hire local talent.
- Improve infrastructure and improve regulatory processes for businesses.
- Position Alexandria as a technology hub and host tech innovation events.

programs (e.g., partnerships with utility companies like Dominion and Washington Gas and hands-on training opportunities such as DASH mechanic apprenticeships). Participants also stressed the need to support the growth of mid-sized firms, particularly in healthcare and professional services. Finally, the group encouraged the creation of communication channels that celebrate local business success stories. The use of student media programs and community ambassadors as tools to promote Alexandria's business community and cultural assets, especially local gems such as the Birchmere, were proposed as examples.

Draft Goal 3. Entrepreneurship and Innovation

Facilitate a thriving ecosystem that supports local entrepreneurs, fosters innovation, and provides pathways for startups to succeed.

Strategies

3.1. Cultivate an innovation ecosystem that connects entrepreneurs with resources and support.

3.2. Encourage the creation of incubator and accelerator spaces that foster innovation and economic activity.

3.3. Foster the development of entrepreneurial skills in students and the existing workforce.

3.4. Celebrate and publicize Alexandria's entrepreneurial successes, raising the city's profile as an innovation destination.

Discussion Summary

This session began with a discussion of the distinction between small businesses and entrepreneurs, and the discrete role each plays in Alexandria's economic development (see Figure 6, page 15). Participants examined the varying goals and impacts of different business types—ranging from local service providers to growth-oriented companies with regional or national reach. They emphasized that economic strategies should support both types, recognizing that entrepreneurship is as much about mindset as it is about business scale. The group also discussed how demographic considerations and emerging opportunities, such as Smart City initiatives, should influence policy and resource allocation.

In terms of support for small businesses, participants identified a number of critical needs. Access to capital was a top priority, particularly for minority-owned businesses. Suggestions included expanding opportunities through minority banks, tax incentives, and financial structures typically reserved for larger anchor institutions. The group encouraged the City to pilot new funding models that reduce reliance on self-funding, especially for small business owners who are more vulnerable to economic failure. Additionally, they stressed the importance of positioning the City as a true economic

GOAL 3. COMMUNITY PRIORITIES

- Cultivate an innovation ecosystem that connects entrepreneurs with resources and support, to include funding and investment networks, and providing guidance through permitting or licensing processes.
- Help existing and emerging business scale up.
- Offer tailored support to minority-owned businesses.

partner—supporting education, mentorship, and technical assistance through collaborations with libraries, AI tools, and organizations like community development financing institutions, which offer loans and mentoring services to traditionally underserved entrepreneurs.

Regarding entrepreneurship, the conversation highlighted the value of resources like the Virginia Tech Institute for Advanced Computing but stressed the need for more such hubs and deeper partnerships. Participants outlined three core characteristics of the local entrepreneurial landscape: (1) the need for a business ecosystem that reflects and supports Alexandria's diverse, immigrant-rich community; (2) the opportunity to retain and leverage a uniquely public service-oriented workforce, particularly in fields like education, global aid, and public administration; and (3) the imperative to grow Alexandria's identity as a home for small tech companies that benefit from proximity to the federal government and the city's high quality of life. The group expressed that, while start-ups are important, helping existing businesses scale up should be a greater focus—and that successful economic development must recognize the interconnected nature of Alexandria's people, infrastructure, and opportunities.

FIGURE 6. HIGH-GROWTH STARTUP–SMALL BUSINESS COMPARISON

CHARACTERISTICS	ENTREPRENEURIAL COMPANIES	SMALL BUSINESSES
Market focus	Serve external markets (traded clusters)	Serve local markets (local clusters)
Capital needs	Capital intensive	Low capitalization
Role of intellectual property (IP)	Highly IP dependent	Little or no proprietary information
Growth expectations	High growth	Modest growth

Source(s): TIP Strategies, Inc.

Wrap-up and Next Steps

Following the summit, people were asked to participate in a post-summit online survey. The survey was available to summit attendees as well as those who did not attend and was open for three weeks, drawing 154 respondents. The survey contained basic questions about respondent location and demographics; the remainder of the survey included fourteen questions with the purpose of receiving feedback on summit content and gaining an additional layer of feedback from people unable to attend or fully participate in the event. The survey was not designed to be a scientific sample, though the pool of respondents was large enough and stratified enough to provide insightful strategic feedback.

FIGURE 7. SURVEY DEMOGRAPHICS

Of survey respondents…

34.4%
attended the economic summit

95.6%
lived in an Alexandria ZIP Code

50.4%
live and work in Alexandria

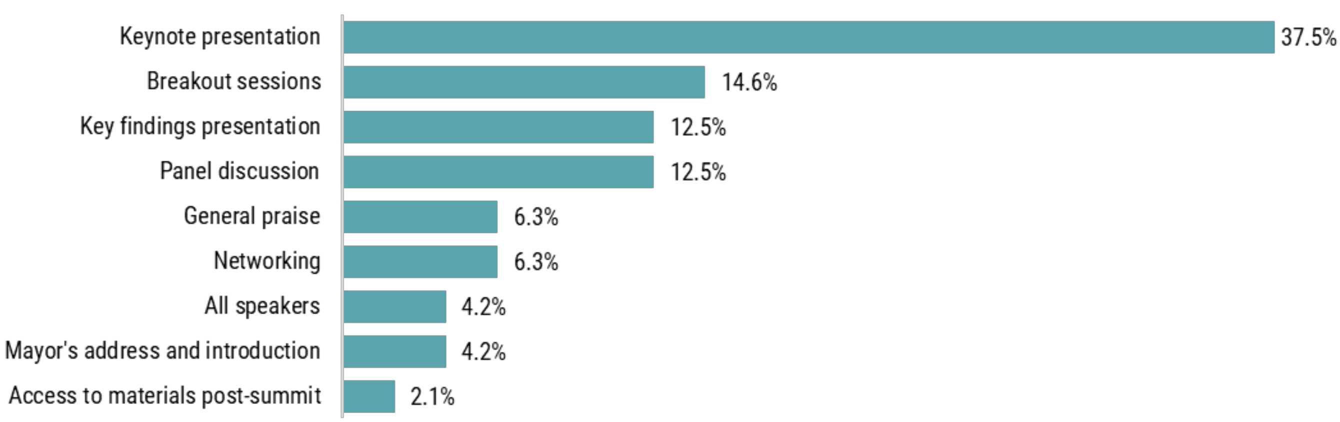
24.8%
commute outside of Alexandria for work

Post-Summit Survey Results

More than one third (34.4 percent) of respondents attended the economic summit. Among respondents that provided demographic information, the majority (95.6 percent) were in an Alexandria ZIP Code. Most (50.4 percent) both live and work in Alexandria, while one quarter (24.8 percent) commute elsewhere. Many people (99 of 154 respondents) described themselves as Alexandria homeowners. Respondents aged 65 to 74 (35 of 154 respondents) were the most dominant age group, while ages 55 to 64 (31 respondents) were similarly overrepresented compared to the city's population. The summit's logistics were well-regarded by attendees, as were the venue and amenities. Respondents praised the summit's speakers as informative and engaging, with the keynote presentation as a highlight. The survey also yielded key insights on each goal area, which are summarized below.

FIGURE 8. BEST OF THE SUMMIT

Q3: What part of the summit did you find most informative or productive?



Source: Survey results compiled by TIP Strategies, Inc.
Notes: Of the 53 respondents who reported attending the Economic Summit, 40 answered this question. Open-ended responses were grouped into categories of comparable sentiments. Some submissions listing more than one highlight were split into multiple responses.

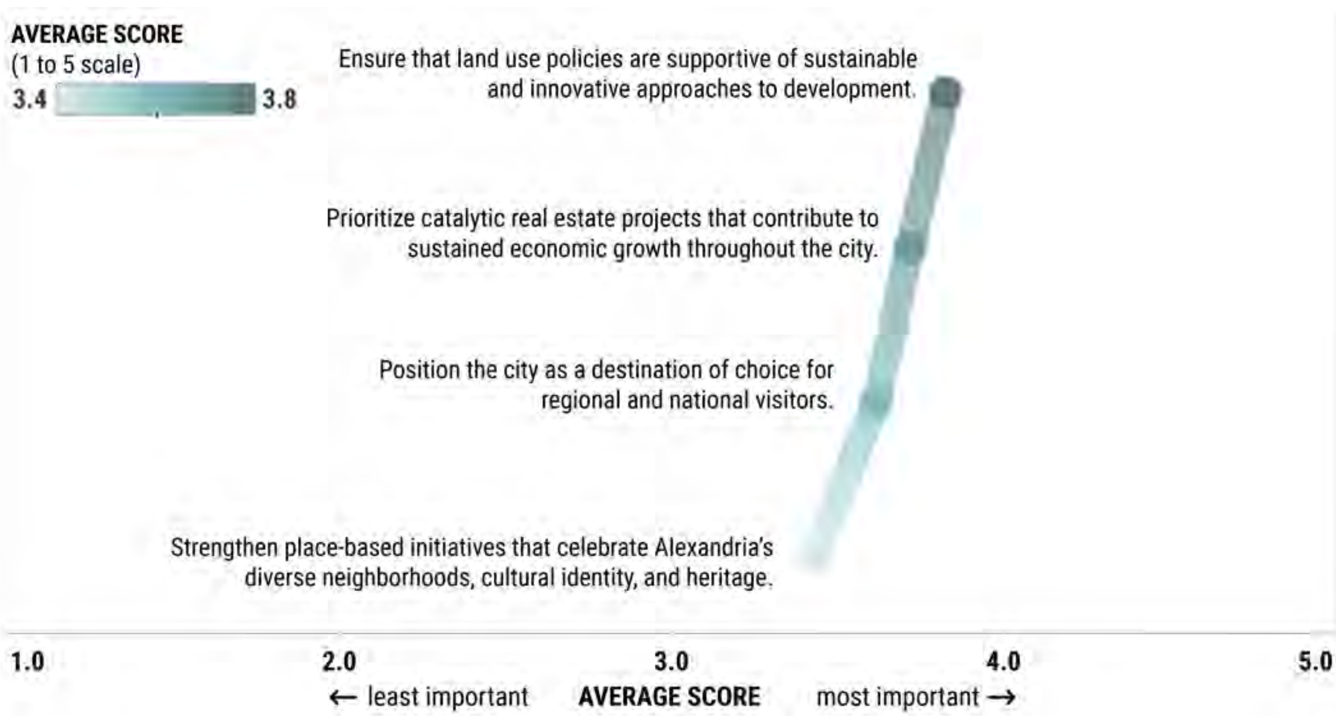
Place-Based Development

Ensuring land use policies that support sustainable and innovative development and prioritizing catalytic real estate project stood out as the two most important place-based development strategies, according to respondents. This was followed by the city's positioning itself as a destination of choice for visitors.

Among future large-scale real estate projects, uses related to the city's quality of life and attractiveness as a destination were rated among the most preferred, including arts or cultural uses, retail, and entertainment. Several destinations related to performing arts were frequently identified as under-represented in Alexandria today, including a performing arts center, theater and performance venues, and a music venue. Other uses like a food hall and indoor sports facilities were also cited. Residential development, which saw both support and opposition in open-ended responses, scored in the lower half of preferred projects. Additionally, open-ended responses emphasized protecting the city's green space and avoiding overdevelopment.

FIGURE 9. GOAL 1

Q5: Please prioritize the place-based development strategies according to how important you believe them to be for Alexandria's future economic growth.



Source: Survey results compiled by TIP Strategies, Inc.
Notes: Of the 154 respondents, 143 answered this question. The scale indicates the average score, with 5 being the highest possible and 1 being the lowest possible. Responses of "N/A or Unsure" are not captured by the average score for this question.

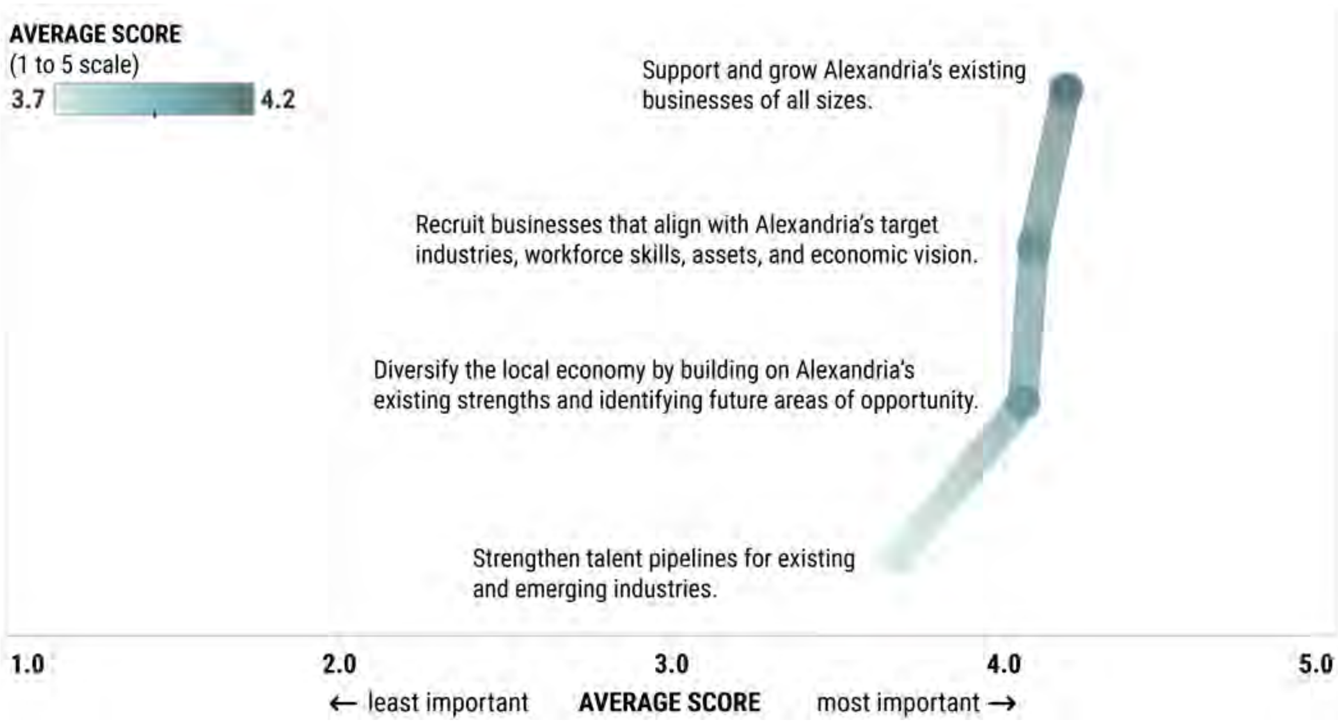
Business Retention and Recruitment

Three of Alexandria's business retention and recruitment strategies received similarly high ratings from respondents: supporting existing businesses, recruiting target industry businesses, and diversifying the local economy. Support for tech and innovation characterized thoughts on business recruitment, with research or innovation focused businesses, tech firms, startups, green businesses, and clean energy among the types of industries identified as Alexandria's most needed. Childcare providers were also frequently identified as a need.

Residents placed a high value on supporting startups and locally owned businesses and emphasized that the city should prioritize target industries that can increase local tax revenue, diversify the local economy, and provide quality jobs. Infrastructure improvements stood out as the most impactful way for the city to competitively attract businesses, while other tools aimed at improving regulatory processes were also rated as impactful.

FIGURE 10. GOAL 2

Q8: Please prioritize the business retention and recruitment strategies according to how important you believe them to be for Alexandria's future economic growth.



Source: Survey results compiled by TIP Strategies, Inc.

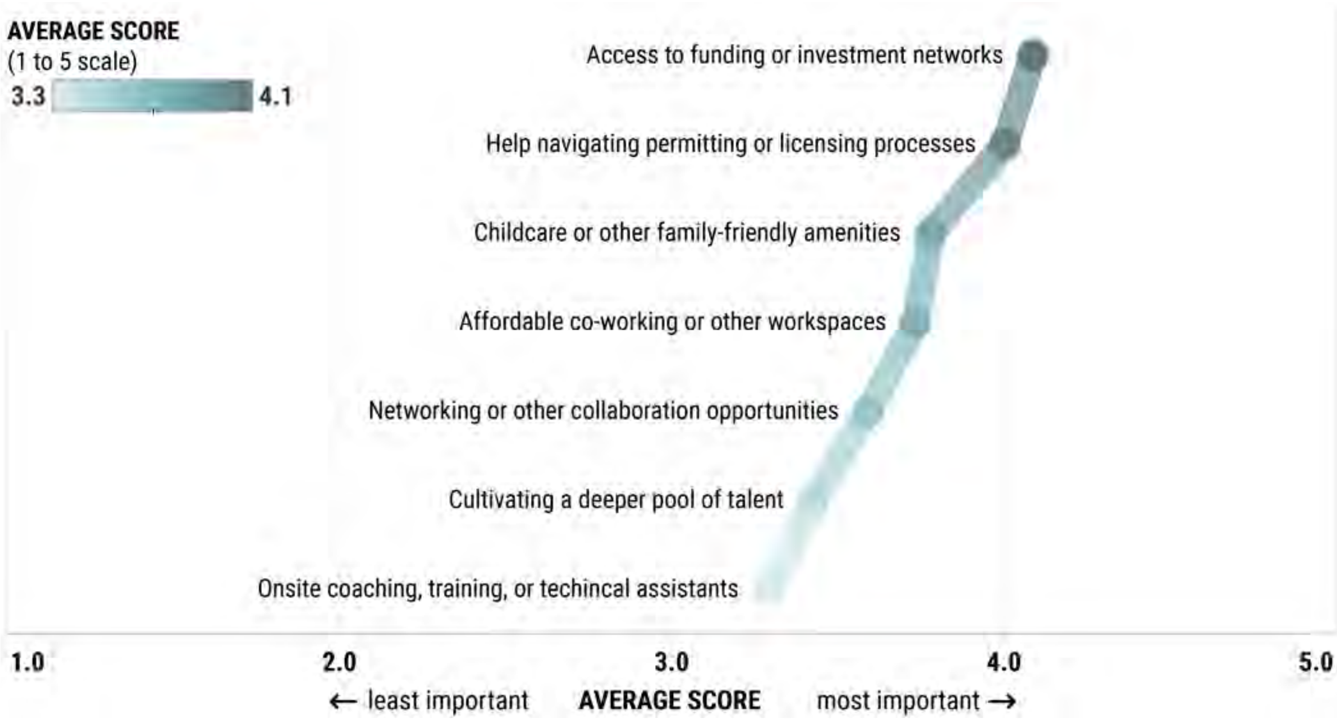
Notes: Of the 154 respondents, 131 answered this question. The scale indicates the average score, with 5 being the highest possible and 1 being the lowest possible. Responses of "N/A or Unsure" are not captured by the average score for this question.

Entrepreneurship and Innovation

Cultivating an innovation ecosystem to connect entrepreneurs with resources and support rated as this goal area's highest priority strategy. Respondents indicated a need for the City to connect its entrepreneurs to funding or investment networks, and to provide guidance through the permitting and licensing process. Other preferred types of support were logistical, like providing childcare or other family-friendly amenities and affordable workspaces to local entrepreneurs. Encouraging the creation of incubator and accelerator spaces was also rated as a significant strategy for establishing Alexandria as a hub for entrepreneurship and innovation. Respondents suggested support for the creation of partnerships between local and regional innovation networks and organizing industry-specific roundtables.

FIGURE 11. GOAL 3

Q13: What types of support would be most helpful to local entrepreneurs?



Source: Survey results compiled by TIP Strategies, Inc.
Notes: Of the 154 respondents, 126 answered this question. The scale indicates the average score, with 5 being the highest possible and 1 being the lowest possible. Responses of "N/A or Unsure" are not captured by the average score for this question.

What's Next?

The summit was the capstone of a multi-faceted engagement process. The insights gathered from the summit will be combined with other input from stakeholder engagement, an in-depth data analysis, and investigation into best practices to further develop a final strategic framework that will guide future economic growth.

Over the next several months, TIP Strategies will craft detailed strategies to support the goal areas in the draft strategic framework (Figure 4, page 9) and will define high-level criteria to guide decision making about future economic development investments. This material will then be shared with City Council for their consideration and approval.

NEXT STEPS

- Combine summit insights with findings from stakeholder engagement and data analyses.
- Continue to investigate best practices that might be a fit for Alexandria.
- Further refine the strategic framework in response to these inputs.
- Craft detailed strategies to support the goal areas.
- Define high-level criteria to guide decision making about future economic development investments.

Unless otherwise noted, photos included in this report are courtesy of the Alexandria Economic Development Partnership and were taken by Sam Kittner. Photo on page 8 was provided by Jennifer Todd-Goynes of TIP Strategies. Speaker images were sourced as follows: Mayor Alyia Gaskins via the City of Alexandria; all TIP Strategies, Inc. staff images provided by TIP; Stephanie Jennings's photo is courtesy CBRE; Megan Welch via the Virginia Economic Development Partnership; and Kevin Ervin Kelley via Shook Kelley.

TIP STRATEGIES

www.tipstrategies.com
+1 512 3439113
contact@tipstrategies.com

STRATEGY • TALENT • RESILIENCE • ADVISORY

10C

From: Adam Brueggman <abrueggman@ajga.org>
Sent: Friday, March 27, 2026 10:41 AM
To: Morgan R. Lynch <mlynch@staffordcountyva.gov>
Cc: Charlie Turner <cturner@AJGA.ORG>
Subject: RE: Tournament Director Introduction

Hi Morgan,

I wanted to be sure to share with you all the local benefiting charities of the tournament since 2022.

As I mentioned, selecting the local benefiting charities is entirely up Tour Stafford as the event's sponsor. Proceeds from the event are split between the local benefiting charities and the AJGA's Foundation. It is also Tour Stafford's decision to determine the portion of the proceeds that each of the local benefiting charities receive.

2022:
- Stafford Education Foundation
- Stafford Junction Inc.

2023:
- Big Brothers Big Sisters Greater Fredericksburg
- Area 11 Special Olympics Virginia

2024:
- SERVE Inc.
- Stafford Country Fire and Rescue

2025:
- Mental Health America of Fredericksburg
- Rappahannock Goodwill Industries

If you have any questions, please let me know!

Best regards,

Adam

Adam Brueggman – Regional Director, Northeast

American Junior Golf Association

1980 Sports Club Drive

Braselton, GA 30517

(412) 638-7790 (m) | abrueggman@ajga.org

Name	EIN	Income	Assets
A Child for All	262329486	$181,722	$243,429
All Endowment Incorporated	541696303	$0	$0
Alliance of Divine Love Incorporated	800289561	$0	$0
Alliance of Divine Love Incorporated	943448426	$0	$0
Amateur Athletic Union of the United States	273880738	$0	$0
Amateur Athletic Union of the United States	463934607	$0	$0
Amateur Athletic Union of the United States Incorporated	461557632	$0	$0
American Federation of State County and Municipal Employees	521831222	$0	$0
American Legion	546072620	$1,589,826	$1,069,967
American Legion Auxiliary	237038209	$0	$0
American Life League	521238301	$5,022,739	$4,691,014
Ancient Free and Accepted Masons of Virginia	510243753	$0	$0
Anne E Moncure Pto Incorporated	113786926	$183,949	$11,189
Anthony Burns Elementary School Parent Teacher Organization	205359603	$52,136	$24,805
Aquia Christian Academy	943462777	$193,770	$4,674

Name	EIN	Income	Assets
Aquia Church Association Incorporated	541129393	$0	$0
Aquia Harbor Volunteer Rescue Squad Incorporated	541519665	$48,087	$366,988
Aquia Harbour Dolphins Swim Club	541114832	$0	$0
Aquia Harbour Preschool Incorporated	541053070	$82,096	$47,094
Aquia Harbour Property Owners Association Incorporated	237171050	$4,341,820	$7,546,052
Aquia Harbour Yacht Club	541503899	$0	$0
Arc of Rappahannock Incorporated	546046070	$25,288	$8,637
Armed Forces Motorsports Foundation Incorporated	463805203	$0	$0
Armed Services Hockey	261423144	$0	$0
Arms Outstretched Ministry Incorporated	264091676	$0	$0
Association of Stafford Volunteer Fire Department Co Engine 2 Incorporated	200819310	$34,375	$35,266
Auto Glass Safety Council Incorporated	364413060	$249,759	$82,808
Bethshemesh Wesleyan Church	541785165	$0	$0
Brooke Point High School Athletic Boosters	541674363	$119,499	$47,957

Name	EIN	Income	Assets
Brooke Point High School Ptso	412249693	$0	$0
Chain of Love Foundation	800152718	$0	$0
Church of God of Prophecy	541133682	$0	$0
Church of the Redeemed	541548731	$0	$0
College Bound Athletics Incorporated	462613221	$0	$0
Colonial Forge High School Athletic Boosters Incorporated	262851808	$47,778	$34,046
Colonial Forge Music Boosters	542054930	$89,188	$28,686
Colonial Forge Parent Teacher Student Organization	541961756	$0	$0
Compassion Restoration Ministries Incorporated	273284368	$105,422	$47,691
Cumberland Housing Group	912193636	$0	$0
Dale City Masonic Association Incorporated	541553572	$0	$0
Dancing Bear Rescue Incorporated	274823914	$0	$0
Daughters of Deborah Ministries	300555201	$0	$0
Delta Kappa Gamma Society International	546064835	$0	$0
Demolay International	272669481	$0	$0

Name	EIN	Income	Assets
Dogs East Incorporated	541137091	$8,044	$107,158
Eagles Nest Educational Foundation	800624699	$0	$0
Emmanuel Korean Baptist Church	541392027	$0	$0
End Time Harvest Church and International Ministries	311650463	$0	$0
Executive Womens Golf Association Incorporated	582680240	$0	$0
FBI National Academy Associates Charitable Foundation	273317834	$29,510	$114,065
Filipino American Association of Stafford Virginia	820571516	$0	$0
Fountain Gate Chapel Incorporated	272128693	$0	$0
Frances C Mcintyre Education Foundation Incorporated	203523881	$0	$0
Frank P Moncure Lodge Scholarship Fund Incorporated	203250250	$0	$0
Fredericksburg Hockey Club Incorporated	541959986	$0	$0
Friends of Stafford Civil War Sites	264411457	$0	$0
Friends of Stafford Creeks	753168365	$0	$0
Full Gospel Church of Long Island	113575253	$0	$0
Future Kings Incorporated	465254881	$0	$0

Name	EIN	Income	Assets
Garrisonville Elementary School Pto	352324073	$87,664	$12,782
Gods House	541773293	$0	$0
Government Management Information Sciences Users Group	742618367	$0	$0
Gps Ministries Incorporated	200668070	$463,578	$66,758
H H Poole Middle School Pto	541781568	$0	$0
Habitat and Animal Health Concern Incorporated	141878093	$0	$0
Hampton Oaks Pto	541655362	$57,394	$28,621
Hampton Oaks Swim Team	541946421	$0	$0
Harvest Christian Fellowship	541690288	$0	$0
Hesed Ministries	541792946	$0	$0
Home of Miracles and Embraces Incorporated	205834015	$0	$0
Hope of Christ Presbyterian Church	113835645	$0	$0
Horizons Church	541743044	$0	$0
Iglesia Evangelica Pena De Horeb Incorporated	263903891	$0	$0
Iglesia Pentecostal Unida En Accion Upc	562401581	$0	$0

Name	EIN	Income	Assets
International Association of Administrative Professionals	541309343	$0	$0
International Association of Fire Fighters	542010006	$73,885	$38,995
International Association of Lions Clubs	541137786	$94,749	$50,117
International Association of Lions Clubs	541860916	$11,484	$1
International Association of Lions Clubs	546054011	$0	$0
International Church of the Four Square Gospel	260107940	$0	$0
International Order of the Rainbow Girls	541923308	$0	$0
International Reading Association Incorporated	541235889	$0	$0
Izaak Walton League of America Incorporated Alexandria Chapter	546057669	$176,603	$211,463
Jackies Song Foundation	202689207	$67,218	$21,580
Joy of Living Water Church	272310344	$0	$0
K9too Motorcycle Club Woodbridge Va Chapter	263543857	$0	$0
Landstuhl Hospital Care Project	753185497	$265,162	$173,149
Living Hope Lutheran Church	541971157	$0	$0
Living Water Ministries Incorporated	421589813	$0	$0

Name	EIN	Income	Assets
Mapga Scholarship Foundation Incorporated	030418343	$130,234	$340,237
Margaret Brent Elementary School Parent Teacher Organization	770637290	$147,562	$38,122
Master Gardener Association of Central Rappahannock Area	271202999	$0	$0
Medicare Assistance and Counseling Incorporated	463694450	$0	$0
Michelle Shelly Nageotte Memoral Scholarship Fund Incorporated	521437470	$2,473	$174,500
Middle Atlantic Section	520846457	$1,774,278	$3,082,975
Moms Club	260066616	$0	$0
Mount Ararat Baptist Church	540913045	$0	$0
Mountain View Band Parents Association	510588990	$96,669	$70,352
Mountain View Fire and Safety Association Incorporated	541716324	$28,191	$462,080
Mountain View High School Ptso	300530884	$14,104	$6,541
Mt Hope Baptist Church	540916819	$0	$0
Mt Olive Baptist Church	541455062	$0	$0
National Association for the Advancement of Colored People	912083103	$0	$0
National Society of the Children of the American Revolution	611561118	$0	$0

Name	EIN	Income	Assets
National Society of the Daughters of the American Revolution	237023855	$0	$0
National Society of the Daughters of the American Revolution	521231754	$0	$0
National Society of the Daughters of the American Revolution	541734414	$0	$0
National Society of the Sons of the American Revolution	541056893	$0	$0
National Society of the Sons of the American Revolution	541916484	$0	$0
National Sojourners Incorporated	526045827	$0	$0
National Unified Service Commandinc	208357988	$0	$0
National Windshield Repair Association	251751394	$21,473	$6,310
Naval Submarine League	521403044	$0	$0
New Life Community Church	521445285	$0	$0
North American Lake Management Association	541530092	$66,381	$124,291
North Stafford Band Boosters	263028644	$123,073	$21,846
North Stafford Baptist Church	541374827	$0	$0
North Stafford High School Athletic Boosters Club	541236587	$0	$0
North Stafford Wolverines Youthfootball Association	260394894	$27,775	$9,782

Name	EIN	Income	Assets
Northern Virginia Church of Christ	043733543	$0	$0
Open Door Community Church of Stafford Incorporated	203481902	$0	$0
Outside the Walls Christian Ministry	273487730	$0	$0
Parent Booster USA Incorporated	454339489	$0	$0
Parent Booster USA Incorporated	461238856	$65,728	$23,709
Parent Booster USA Incorporated	462273868	$0	$0
Park Ridge Elementary Parent Teacher Organization	541845111	$73,105	$15,996
Pbs Philosophy Born of Struggle	351992713	$0	$0
Pioneer Football League Incorporated	562206317	$114,332	$29,367
Place Ofa Second Chance	452117609	$9,997	$4,826
Prismpotential	462383863	$0	$0
Proyecto Sur Rd Incorporated	453048699	$0	$0
Pwc Pspa	900923066	$0	$0
Quantico Chapter 32 of the Montford Point Marine Association Incorporated	463406973	$14,438	$11,178

Name	EIN	Income	Assets
Rappahannock Area Ymca Swim Team	541206644	$518,228	$215,737
Redeemed Christian Church of God Amazing Grace Sanctuary	043806491	$0	$0
River of Life P H Church	541512378	$0	$0
Rock Hill Vol Rescue Squad Incorporated	541196469	$52,307	$265,012
Rockhill Elementary School Parent Teacher Organization	541610942	$82,399	$23,817
Rodney E Thompson Middle School Pto	752971075	$33,466	$24,608
Rotary International	800374575	$0	$0
Run to Honor	273345038	$0	$0
Ruritan National Corp	546057998	$0	$0
Shepherds House	541984669	$0	$0
Shiloh Ministry International	541699452	$0	$0
Shirley C Heim Middle School Pto	611570258	$0	$0
Sons of Confederate Vetrans Incorporated	465441486	$0	$0
Sons of Union Veterans of the Civil War	461791560	$0	$0
St Augustine in the Fields	141847781	$0	$0

Name	EIN	Income	Assets
St Michaels No 1 Hopewell Va	462046594	$0	$0
St Peter Lutheran Church	541094928	$0	$0
St William of York Church	541027224	$0	$0
St William of York Outreach Incorporated	201336163	$65,647	$75,390
Stafford Academy Incorporated	300763598	$0	$0
Stafford Aquatics Team Incorporated	204382483	$302,477	$94,122
Stafford Aquia Evening Lions Charities Incorporated	300573704	$30,949	$13,729
Stafford Area Soccer Association Incorporated	541313246	$1,055,987	$1,321,849
Stafford Athletic Association	454845154	$0	$0
Stafford Baseball League Incorporated	541609685	$398,339	$206,661
Stafford County Crime Solvers Incorporated	541372983	$0	$0
Stafford County Historical Society Incorporated	541123278	$0	$0
Stafford County Rescue Squad Incorporated	521400290	$105,463	$136,134
Stafford County Vocational Education Foundation Incorporated	541516883	$301,920	$441,193
Stafford Education Foundation Incorporated	743216260	$0	$0

Name	EIN	Income	Assets
Stafford Emergency Relief Through Volunteer Efforts of Stafford Coun	541289683	$738,740	$413,679
Stafford Home Fellowship Shf Partners in World Missions	204826893	$0	$0
Stafford Hope Center Incorporated	455354408	$0	$0
Stafford Lacrosse Association Incorporated	201525152	$60,104	$43,400
Stafford Lodge 2215 Loyal Order of Moose	541086701	$160,645	$279,990
Stafford Middle School Pto	830385168	$0	$0
Stafford Museum and Cultural Center Foundation Incorporated	061839443	$0	$0
Stafford Sheriffs Employee Benevolent Fund	272297867	$2,346	$1,076
Stafford Vipers	454146529	$0	$0
Stafford Volunteer Firemans Association Incorporated	541014484	$188,436	$406,959
Stafford Youth Football Coaches Association Incorporated	270424907	$0	$0
Summit Presbyterian Church	541568636	$0	$0
T V and Me Incorporated	541583247	$0	$0
The Cambridge Foundation Incorporated	203686965	$0	$0
The Coalition for Housing Opportunities in the Community	300106626	$0	$0

Name	EIN	Income	Assets
The Destiny Church	510661587	$0	$0
The Foundation for the Development of the South of Haiti	800623606	$0	$0
The Fullness of God Outreach Ministries International Incorporated	364667521	$0	$0
The Mapga Junior Golf Foundation Incorporated	541558001	$413,108	$734,073
The Pet Assistance League of Virginia	541450007	$49,893	$23,607
The Ruby Church of Christ	521272220	$0	$0
The United State Pony Clubs Incorporated	540928438	$0	$0
Third Us Infantry Regiment 1860- 1865	541718143	$0	$0
Toastmasters International	205097963	$0	$0
Toastmasters International	546065218	$0	$0
Toastmasters International	680603704	$0	$0
Toastmasters International	900971376	$0	$0
Toastmasters International	901011639	$0	$0
Touch of Color Day School	261971118	$87,241	$1,618
Trumpet and Torch Ministries	261217304	$4,957	$21,785

Name	EIN	Income	Assets
United Faith Christian Ministry	311769489	$0	$0
United States Pony Clubs Incorporated	541717236	$0	$0
United States Power Squadrons	752977128	$0	$0
Virginia Association for Teachers of Family and Consumer Sciences in	300620863	$40,934	$112,343
Virginia Congress of Parents and Teachers	453366641	$0	$0
Virginia Congress of Parents and Teachers	541533567	$0	$0
Whole Truth Curch of the Lord Jesus Christ	651226682	$0	$0
Women Marines Association	541407415	$0	$0
Word of Faith Christian Fellowship	621439673	$0	$0
Word of Faith Hour Broadcast Incorporated	237246441	$0	$0