

**LONGWOOD UNIVERSITY**

**BOARD OF VISITORS**

**December 6-7, 2013**

**Minutes**

**Call to Order**

The Longwood University Board of Visitors met on Friday, December 6, 2013 in the Stallard Board Room in Lancaster Hall. The meeting was called to order at 9:30 a.m. by Rector Marianne Radcliff, following an open continental breakfast for Board members, department chairs, and others in attendance.

Members present:

Dr. Edward Gordon  
Mr. Eric Hansen  
Mr. Stephen Mobley  
Mrs. Marianne M. Radcliff  
Mr. Brad Schwartz  
Mrs. Shelby Jones Walker  
Mr. Lacy Ward, Jr.  
The Hon. Robert S. Wertz, Jr.

Mrs. Jane Maddux participated by phone, pursuant to Section 2.2-3708.1.A.2 of the Virginia Code, due to illness.

Members absent:

Mr. Thomas Johnson  
Dr. Judi M. Lynch  
Mrs. Colleen McCrink Margiloff  
Mr. Ronald White

Also present:

President W. Taylor Reveley IV  
Mr. Kenneth Copeland, Vice President for Administration and Finance  
Dr. Kenneth Perkins, Provost and Vice President for Academic Affairs  
Ms. Victoria Kindon, Vice President for Strategic Operations  
Mr. Troy Austin, Director of Athletics

Ms. Brenda Atkins, Vice President for Commonwealth Relations  
Mr. Richard Bratcher, Vice President for Facilities Management and Real Property  
Mrs. Virginia Kinman, Director of SASCOC Compliance Certification  
Mr. David Overstreet, Senior Auditor  
Mr. Cameron O’Brion, Office of the Attorney General  
Dr. David Lehr, Chair, Faculty Senate  
Dr. Audrey Church, Faculty Representative  
Ms. Haley Vest, Student Government Association  
Ms. Hannah Ledger, Co-Chair, Staff Advisory Committee  
Ms. Allison Dobson, Co-Chair, Staff Advisory Committee  
Mr. JaBari Scott, Staff Advisory Committee

### **Public Session**

No public comments were received at this meeting.

### **Rector’s Welcome**

Mrs. Radcliff welcomed Board members and all in attendance to the meeting. She noted that it had been a difficult week for the Longwood community with the death of University senior Fitzhugh Gordon Samuel, while also noting that the University in general continues to build momentum. The inauguration of President Reveley in November was a true celebration. Before turning to President Reveley, she stated that the format of the meeting was intended to continue to maximize discussion and deliberation. She also extended the best wishes of all present to Jane Maddux, joining by phone.

### **President’s Welcome**

President Reveley joined with Mrs. Radcliff in stating that it had been a challenging week with the sudden death of Fitz Samuel just two days prior. He stated that the University had responded with grace and care for the family and those closest to Mr. Samuel, drawing attention in particular to the work of Dean of Students Larry Robertson and Chief of Policy Bob Beach.

President Reveley also echoed Mrs. Radcliff’s sentiment that the University continues to build momentum. As of December, applications for next year’s freshman class are up 25% compared to this time last year. Our philanthropic cash receipts are likewise up by \$1.1 million over this time last year. The SACSCOC accreditation reaffirmation process continues to move smoothly, and Moody’s has given the University an A1 bond rating; only several hundred colleges and universities in the nation have a bond rating as good or better.

He said the University was looking forward to the annual Holiday Dinner musical performance that evening and was delighted that Board members could join. He noted that the deliberations this morning would focus on various business matters, and that the afternoon session would focus on broad strategic matters as well as the fundamentally important issue of retention and graduation. He also looked forward to Saturday morning’s Board session focused on the role of the liberal arts in higher education today.

## **Approval of Consent Agenda**

Mrs. Radcliff presented to the Board for its approval the consent agenda, which included the minutes of the Board's September meeting along with items concerning standard edits, updates, and amendments to University policy, procedure, and planning, specifically regarding: Internal Audit, various matters pertaining to Academic Affairs, administrative matters concerning HR and fixed assets management, and lastly a continuing update to the six-year academic and financial plan which the State Council for Higher Education in Virginia (SCHEV) asks of each public institution of higher education in the Commonwealth. Pursuant to customary practice, this fall SCHEV requested a further update to the plan following initial submission in June 2013. Mrs. Walker moved to approve the consent agenda, Mr. Schwartz seconded, and the motion was approved unanimously. A copy of the consent agenda items is included as Appendix 1 attached hereto.

## **Overview Discussion of Financial Operations**

President Reveley, along with Mr. Copeland, led an overview discussion of the University's financial operations. They noted that public institutions of higher education have particularly nuanced and technical finances. In particular, unlike in many other sectors of the for-profit and non-profit world, different streams of funding carry different restrictions and considerations. Tuition, fees, unrestricted philanthropic contributions, restricted philanthropic contributions, business income, state appropriations for operations, and state appropriations for capital each must be handled in separate and distinctive fashions.

The University is endeavoring to make its budgeting process more open and inclusive through the University Planning Council and likewise to ensure that the sound financial health of the institution is reflected in continued attention to improving compensation for faculty and staff. President Reveley indicated that a pool of funding for performance-based salary increases should become a standard aspect of fiscal year budgets going forward. He also indicated that it would be prudent for the University to begin utilizing a capital budgeting process alongside the operating budgeting process. The Board expressed interest in both matters.

Building on discussion from prior Board meetings, President Reveley stressed that improving retention and graduation is the key catalyst for continuing to improve University revenue. Regarding student revenue, Mr. Schwartz asked whether the current balance between tuition, on the one hand, and student fees, on the other, warranted fresh consideration, and President Reveley and Mr. Copeland indicated that it may indeed. The total sum is what parents and students focus on, even though how tuition may be utilized by the institution does differ from how fees may be utilized.

President Reveley stated that enhancing philanthropic revenue must also be a key longterm focus for the University. Ms. Atkins concurred that as state funding remains generally constant or potentially declines in the years ahead due to macroeconomic pressures, philanthropic revenue will be necessary to continue to propel the University. The fundamentally important step in building philanthropic revenue is building the annual fund, both in number of givers and

aggregate sum. Annual fund givers are the pool from which new prospects for major gifts, planned gifts, and corporate gifts may be best identified.

### **Reports from Representatives to the Board**

Dr. Audrey Church, faculty representative to the Board, opened by expressing her gratitude to Dr. Derek Taylor, her predecessor as representative to the Board, and to President Reveley for his engagement with faculty. She expressed her enthusiasm for the role and asked the Board what they would like to hear from her in future meetings. Board members variously indicated they would like to know more about student research, faculty research, the work of Faculty Senate, and what issues are foremost on faculty's minds.

Ms. Haley Vest, President of the Student Government Association, then gave the student representative report. She noted that the death of Fitz Samuel has indeed been difficult for the campus, and commended President Reveley for the care and leadership he has demonstrated. She expressed that the students very much enjoyed President Reveley's inauguration, in particular his remarks, those by his father, and that President Reveley rang the bell after the ceremony with his boot, improvising when the clapper for the bell could not be found.

Ms. Allison Dobson, Ms. Hannah Ledger, and Mr. JaBari Scott then gave remarks on behalf of the Staff Advisory Committee. They too expressed that the staff had enjoyed the inaugural events and appreciated President Reveley's engagement. The Staff Advisory Committee has also embarked on an effort to raise funds for their initiatives and to that end they have created their own Longwood calendar for sale, in honor of the 175<sup>th</sup> anniversary with current and historic pictures of Longwood.

### **Internal Audit**

Mr. David Overstreet, Senior Auditor, then gave the Internal Audit report. He thanked the Board for approving various policy updates earlier in the consent agenda. He noted that though Internal Audit is not at full staff, it is continuing its work at high levels and in particular has recently completed field work with the Student Union & Fraternity/Sorority Life. He also noted that the Virginia Auditor of Public Accounts is progressing with the University's financial audit so that the financial audit is complete in a timely fashion for future University submissions in connection with the SACSCOC accreditation reaffirmation process.

*The Board adjourned for lunch at 12:00 p.m. and reconvened at 1:00 p.m.*

### **Strategic Considerations and Process**

Following lunch, President Reveley opened discussion of the University's strategic direction. He stated that the University would benefit from a focused strategic process that utilizes the existing structures and organs of the University for deliberation (rather than creating a parallel strategic planning structure). The Board indicated its consensus with such an approach. President Reveley then outlined the following strategic considerations, which build on discussions at prior Board meetings and campus discussions:

## **A. Dedication to key principles:**

Academic Enterprise at the Heart – we are one of America’s hundred oldest colleges and universities, and Virginia’s third oldest public university, after William & Mary and UVa

Transforming Lives – we are at our best when helping to transform lives, by helping our students to truly realize their potential

Camaraderie – we enjoy a distinctive camaraderie, enriched by our many traditions; a camaraderie that gives us a distinctive advantage when working through challenges and challenging times

## **B. Focus on what most needs to be done:**

Retention & Graduation – it is a moral imperative, and likewise catalytic from the standpoint of revenue and the spirit of the University

Renewing General Education – we can build a powerful curriculum, building on the liberal arts of citizen leaders, our unique assets such as Hull Springs, the LCVA, and nearby Moton, and our technology

National Marketing – institution-wide endeavor and marketing collaboration will make one of the fifty oldest NCAA Division I schools as well-known as it should be

Foot Traffic by Alumni and Friends – philanthropy and public support for the University hinge on visits to campus and in-person engagement, since those who see our beautiful campus love Longwood

Prosperity of One of America’s Oldest Two-College Communities – Farmville, HSC, Prince Edward, and Longwood stand together where the Civil War ended and Civil Rights began; we will thrive together

Strengthening the University Community – compensation must rise and opportunities for professional development must increase, and fostering diversity will enhance retention and hiring

Housekeeping, Structuring, and Governance – there has not been a full opportunity in almost two decades for a fresh look at how Longwood fits together and at our policies, practices, and data methodologies

## **C. Perspective on what we can become:**

A Model for American Higher Education – few institutions in the country have Longwood’s potential to make great progress; we have kinetic energy without the entrenched views prevalent at many institutions

The Board expressed strong support of these strategic considerations. Mr. Ward suggested that reference should be made to the importance of the residential nature of the University and likewise to the personal interaction students have with faculty that is such a hallmark of Longwood. President Reveley agreed, and also noted that a campus master planning process is important in connection with the residential nature of the University and likewise regarding the relationship of the University and community and the power to attract alumni to return to campus.

President Reveley suggested that if the Board was in consensus on the above strategic considerations in concept, he would use them as a basis of discussions during the spring semester with the Faculty Senate, Student Government Association, Staff Advisory Committee, Longwood University Foundation Board, Real Estate Foundation Board, Alumni Association, and others in preparation for formalizing a fresh strategic plan for the University going into academic year 2014-15, which would likewise be a catalyst for campus master planning in 2014-15. The Board expressed enthusiasm and consensus.

### **Housing & Dining Fees for 2014-15 and New Construction**

President Reveley next turned to two specific items. Mr. Copeland, Mr. Pierson, and their teams worked to prepare proposed housing & dining fees for academic year 2014-15 several months earlier than had previously been customary --- so that students would have the advantage of knowing these fees sooner as they consider their housing and dining options. On review of the fees, Mr. Schwartz moved to accept the fee schedule, seconded by Mr. Hansen, and the Board approved unanimously. The 2014-15 Housing and Dining Fee Schedule is attached hereto as Appendix 2.

Pursuant to discussion at the Board's September meeting, the University has progressed with pre-planning for construction of a new residence hall on main campus. Based on discussions with the Attorney General's Office, the prudent approach appears to be to execute a ground lease with the Longwood Real Estate Foundation to facilitate construction. Mr. Ward moved to approve this approach, subject to the continuing work of the Attorney General's Office and the Longwood Real Estate Foundation; Mr. Schwartz seconded, and the Board unanimously approved. President Reveley noted that this residence hall would be the first constructed on main campus in two decades.

### **Retention & Graduation**

President Reveley turned discussion to the issue of Retention and Graduation, the most important matter for the University. He noted that Chief of Staff Justin Pope has prepared a white paper on the matter with extensive appendices, as included in the Board's briefing materials. Dr. Perkins stated the Mr. Pope's white paper gave an important overview of retention and graduation at the University, and he also noted the momentum that has built on the issue.

President Reveley then asked Dr. David Lehr, Chair of the Faculty Senate, to give an overview of the paper he had prepared, also included in the Board's briefing materials. Dr. Lehr's paper applied statistical learning techniques to matriculation cohorts of Longwood students --- a "big data" approach to identifying variables that predict retention and graduation at Longwood.

Ms. Kindon, who joined the University in November as Vice President for Strategic Operations, commented that it has been a delight to work with Dr. Lehr as well as with her new team in Strategic Operations. She noted that the University is working to standardize and unify its data, an essential step in bringing to bear big data methodologies in full on matters such as retention and graduation. The process of standardizing and unifying the University's data is substantial, and as it progresses the University will naturally begin taking pilot steps to address improving retention and graduation. For instance, in advance of the Thanksgiving break, President Reveley sent personal letters to several dozen freshmen who have been performing exceptionally well academically, a set of students sometimes tempted to consider transferring to other institutions. The letters underscored that Longwood, the third oldest public university in Virginia, indeed is where such students can enjoy close and enriching engagement with faculty members.

The board expressed broad enthusiasm for this turn to "big data" for the University.

### **Closed Session**

Mr. Schwartz moved to go into closed session under Sections 2.2-3711.A.1,3, & 8 of the Code of Virginia to discuss personnel matters, real property matters, and philanthropic matters. The motion was seconded by Mr. Ward and approved unanimously by the Board.

In compliance with the provisions of the Freedom of Information Act, the Board returned to open session. Mr. Mobley moved to certify that the discussion in closed session was in accordance with the Code of Virginia. The motion was seconded by Mr. Hansen and affirmed and approved by roll call vote by: Dr. Gordon, Mr. Hansen, Mr. Mobley, Mr. Schwartz, Mrs. Walker, Mr. Ward, Mr. Wertz, and Mrs. Radcliff.

Mr. Schwartz then moved to approve tenure and promotion to the rank of Associate Professor for Dr. Charles D. White. The motion was seconded by Mrs. Walker and approved unanimously by the Board.

The Board then adjourned for the day at 5:00 p.m. before joining the University community for the 38<sup>th</sup> annual Holiday Dinner and musical performance in Dorrill Hall.

### **Saturday, December 7, 2013**

The Longwood University Board of Visitors resumed its meeting at 9:30 a.m. on Saturday, December 7, in Ruffner Hall, Room 312. All Board members from Friday's meeting, except Dr. Gordon, were present along with President Reveley, the vice presidents, deans, and several faculty and student representatives. Mr. White also joined the meeting, having also attended the prior night's Holiday Dinner as well. The focus of the session was discussion of the role of the liberal arts in higher education today.

Dr. Wade Edwards, Chair of the Department of English and Modern Languages, opened the session with brief remarks at the request of President Reveley.

Dr. Edwards began by noting the description of a liberal arts education used by the Association of American Colleges and Universities: "A philosophy of education that empowers individuals

with broad knowledge and transferable skills, and that cultivates social responsibility and a strong sense of ethics and values.”

He then discussed “four and a half” reasons for the enduring importance of the liberal arts:

1. *Practical answer.* As a broad way of thinking, the liberal arts train students for anything. They are foundational. Rather than focus on narrow vocational skills, courses in the liberal arts emphasize transferrable skills. This is important and practical because contemporary students will change jobs over the course of their careers, and even those who stay in the same career may have multiple or changing responsibilities within that track. Teachers become principals; pharmacists become business-owners; social workers become managers. The outcomes of liberal arts background—maybe we call it the liberal arts apprenticeship—prepare students for the uncertainty we know they can expect. Students often come to college seeking certainty. It is our job to prepare them for uncertainty. That’s what the liberal arts do.

1½. *The “return on investment” answer.* We know that employers want to hire workers with a liberal arts background; study after study shows us this. Study after study also shows us that over the course of their lives, Liberal Arts students tend to be more financially secure than those with strictly vocational backgrounds. Liberal art classes tend to be smaller and offer more opportunities to work on what employers call “soft skills.” This answer—the return on investment answer-- may be counterintuitive to many. If a college education should lead to a stable career, shouldn’t we advise students to settle on a professional major as quickly as possible and seek out opportunities that lead directly and obviously to employment? Is college worth it if it doesn’t set us on a clear path to prosperity? It is notable that even if liberal arts graduates begin their careers at salaries lower than those with professionally focused degrees, as their careers progress and they assume leadership roles liberal arts graduates begin to earn more than others.

2. *The “life-is-better” answer.* University of Virginia professor Mark Edmundson contends that we shouldn’t support the liberal arts to help people make money but instead to help them lead meaningful lives, noting in a recent Washington Post op-ed that the liberal arts “are not about success. They’re about questioning success — and every important social value. Socrates taught us this, and we shouldn’t forget it. Sure, someone who studies literature or philosophy is learning to think clearly and write well. But those skills are means to an end. That end, as Plato said, is learning how to live one’s life. “This discussion is not about any chance question,” Plato’s Socrates says in The Republic, “but about the way one should live.”

3. *The “citizen leader” answer.* As a public institution, Longwood is devoted not just to the personal advancement of our individual students, but also to the advancement of the public good. This is a tremendous responsibility—molding citizens with the talent and wherewithal to engage in the messiness and work of free society. As President Reveley noted in his inaugural address, the liberal arts are quite literally the “course of study befitting citizens in a republic; ‘liberal’ having the same root as the word ‘liberty.’” In his inaugural address, President Reveley also noted that Longwood’s deepest heritage is as a liberal arts institution: “At the founding in 1839, at a juncture before any professional



career outside the home was meaningfully open to women, including teaching, our curriculum consisted of: music, literature, mathematics, Latin, and Greek.”

4. *The student answer.* Until students in the Virginia public school system get to college, they are not encouraged to think about the big picture. They are extraordinarily eager for opportunities for abstract thinking, perhaps because so much of education has moved away from abstract thinking. Longwood students value the liberal arts. Supporting their intellectual desires will lead to the retention of intellectual students, and citizen leaders.

The Board then engaged in discussion. President Reveley noted that throughout the centuries the phrase “liberal arts” has contemplated the humanities and math and the sciences together as a whole and that recent focus on STEM education has had the effect to some extent of separating aspects of education long considered as integrally related. Mr. White noted that his experience at West Point resonated with this understanding of the liberal arts; West Point focuses on engineering but with deep engagement with the humanities as well.

Mr. Mobley asked how the threat to the liberal arts actually manifests itself, to which President Reveley and others replied that there is the potential of reduced state funding, to the extent the General Assembly does not focus on the liberal arts, and there is the issue of students and parents not seeing the value of the liberal arts and opting only for pre-professional studies.

Mr. Schwartz noted that there are two aspects to the role of the liberal arts at Longwood: 1) to what extent students choose liberal arts majors and 2) the role of the liberal arts in the University’s general education curriculum. On another front, others noted that the very word “liberal” in “liberal arts” is sometimes wrongly understood to have a political connotation, which may detract from the appeal of the liberal arts.

Mrs. Walker indicated the importance of making the concept of the liberal arts understandable to first generation college students. Mrs. Radcliff discussed the potential benefits of more explicitly underscoring the value of the liberal arts during freshman orientation, at New Lancers Days. Mr. Hansen noted from his own experience that those with exposure to the liberal arts rather than purely technical or professional studies are most likely to ultimately rise to management and leadership roles during their careers. To that end, several discussed the possibilities of Longwood fostering strong connections with professional graduate programs for our students and likewise of collecting data on their careers one and two decades after graduation as well as for the years immediately following graduation. Dr. Edwards closed the discussion by noting that the Board’s interest in the liberal arts is deeply meaningful to the faculty, which the deans and other faculty present affirmed.

President Reveley and Mrs. Radcliff thanked everyone for their candid and thoughtful discussion.

The meeting adjourned at 11:00 a.m.

# **Appendix 1**

**LONGWOOD UNIVERSITY**

**BOARD OF VISITORS**

**September 13 & 14, 2013**

**-Minutes-**

**Call to Order**

The Longwood University Board of Visitors met on Friday, September 13, 2013 in Cox Hall on campus. The meeting was called to order at 9 a.m. by Rector Marianne Radcliff.

Members present:

Dr. Edward Gordon  
Mr. Thomas Johnson  
Dr. Judi M. Lynch  
Mrs. Jane S. Maddux  
Mrs. Colleen McCrink Margiloff  
Mr. Stephen Mobley  
Mrs. Marianne M. Radcliff  
Mr. Brad Schwartz  
Mrs. Shelby Jones Walker  
Mr. Lacy Ward, Jr.  
The Hon. Robert S. Wertz, Jr.  
Mr. Ronald White

Members absent:

Mr. Eric Hansen

Also present:

President W. Taylor Reveley, IV  
Mr. Kenneth Copeland, Vice President for Administration and Finance  
Dr. Kenneth Perkins, Provost and Vice President for Academic Affairs  
Dr. Tim Pierson, Vice President for Student Affairs  
Mrs. Aneicia Stimpson, Acting Director of Internal Audit  
Mr. Troy Austin, Director of Athletics  
Ms. Brenda Atkins, Vice President for Commonwealth Relations  
Mr. Richard Bratcher, Vice President for Facilities Management and Real Property  
Mrs. Virginia Kinman, Director of SACSCOC Compliance Certification  
Mr. Cameron O'Brion, Office of the Attorney General  
Mr. Robert Burger, President, Longwood University Foundation

Ms. Kathleen Early, President, Alumni Association  
Dr. David Lehr, Chair, Faculty Senate  
Dr. E. Derek Taylor, Faculty Representative  
Ms. Jeanne Hayden, Executive Assistant for Commonwealth Relations  
Ms. Haley Vest, Student Government Association President  
Mrs. Louise Waller, Executive Director, Longwood University Real Estate Foundation  
Ms. Hannah Ledger, Co-Chair, Staff Advisory Committee  
Ms. Allison Dobson, Co-Chair, Staff Advisory Committee

**Public Session**

No public comments were received at this meeting.

**Rector's Welcome**

Mrs. Radcliff introduced new board members Colleen Margiloff and Bob Wertz and also recognized Bob Burger, President of the Longwood University Foundation, and Kathleen Early, President of the Alumni Association. The Rector then recognized the long service of Ms. Jeanne Hayden to the Board of Visitors and applauded Ms. Hayden's new key role as Executive Assistant for Commonwealth Relations. The Board rose in a standing ovation for Ms. Hayden.

**Approval of Consent Agenda**

Mrs. Radcliff presented to the Board for its approval the consent agenda, which was approved unanimously. The consent agenda included the minutes of the June 2013 Board of Visitors Meeting, an articulation agreement between the University and University Foundation, and an approval of real estate signatory authority. (A copy of the consent agenda items is included as Appendix 1.)

**President's Welcome**

President Reveley offered welcoming remarks, noting he has now passed his first 100 days in office, and presented a financial overview of the University, which he described as in strong financial condition. He asked Virginia Kinman to update the Board on the status of the SACSCOC reaffirmation of accreditation process and she shared with the Board information gathered for the Compliance Report. The reaffirmation process is moving smoothly. President Reveley explained the University has elected to report itself fully compliant with all SACSCOC requirements and standards except one: it is reporting itself as partially compliant concerning faculty evaluation, due to issues with how Longwood has evaluated some adjunct faculty in the past. All full-time faculty receive appropriate evaluation. He and Dr. Perkins said steps are being taken to ensure existing policies are followed going forward. Mr. Mobley asked about the costs of the SACSCOC reaffirmation process. President Reveley replied they are considerable but easier for

Longwood to bear than some other institutions. The decennial reaffirmation of accreditation process is expected to be fully complete in December 2014.

### **Academic Affairs**

Dr. Perkins explained the structure and scope of his division. President Reveley described the importance of the curriculum review that will take place in the coming years, and described aspects of the Quality Enhancement Plan and its connection to general education reform, as well as how undergraduate research will become a signature portion of a Longwood education. Mrs. Maddux inquired about funding for the Center for Academic Faculty Enrichment. Dr. Perkins responded its support currently comes from other budgets but the goal is for CAFÉ to have its own. Dr. Lynch emphasized the center's importance.

### **Administration and Finance**

Mr. Copeland offered an overview of the University's financial position and funding sources. He described progress of the Lancer Plan, the University's new budget and planning tool, and emphasized the importance of professional development, namely maintaining professional and trade designations – an area that may have received insufficient attention during the economic downturn. Mr. Burger noted the improved state of the Foundation's endowment. President Reveley emphasized the importance of streamlining operations that remain paper-based, and improving payment to student employees. He noted Longwood is unusual in holding such a high level of reserves exclusively with the state rather than also as local funds. He wishes to explore options for more effectively managing cash reserves going forward. Mr. Copeland described efforts to ensure bill collection does not interfere with other University goals such as retention and is not unduly punitive, and said a \$50 graduation fee has been abolished for 2014. Mrs. Radcliff emphasized the importance of a strong financial foundation for instilling confidence in potential funding sources, namely the Commonwealth and donors.

### **Commonwealth Relations**

Ms. Atkins described her new role as of September 1 and her goals of developing programming to benefit Longwood students but also attracting 100-300 VIPs to visit campus and develop a closer relationship with the University. She updated the Board on interactions with state officials, and efforts to introduce the president to key decision-makers, and to attract more of them to campus. She noted the recent capital campaign had been relatively successful considering its unfortunate timing just ahead of the global financial crisis, and discussed goals to reach a broader corporate and foundation audience, as well as expand conference activities.

Mr. Mobley asked about the cost and effectiveness of Longwood's fundraising efforts. President Reveley said the University's cost per dollar raised is somewhat lower than the general target of 10 cents on the dollar but better information is needed and more resources are needed for advancement. Due to pressures on Virginia's budget, he said Longwood will over a ten-year horizon need to develop philanthropic support approaching current levels of state support. Mrs. Margiloff posed a question regarding how best

to instill a culture of giving in current students and recent alumni, and Dr. Lynch emphasized the importance of class affinity for fundraising. President Reveley said the warmth alumni feel for Longwood isn't currently fully translated into giving, and emphasized better retention could improve class affinity by keeping students together with their cohorts. Ms. Vest emphasized the importance of developing small donations, considering the difficulties of students facing loan debt. Mr. Schwartz noted how the revived football program has driven student engagement at Old Dominion University. President Reveley agreed that sports at the Division I level offer unparalleled opportunities for developing identity and marketing the University.

### **Athletics**

Mr. Austin gave an overview of all departmental operations. He noted the goal of holding flat and eventually reducing the student athletic fee, and discussed the rapidly changing landscape of the NCAA, including how Longwood would be affected if the NCAA allows institutions to pay student-athletes. President Reveley noted the importance of building contacts with orthopedic experts given their paucity in Farmville. Dr. Gordon suggested exploring an arrangement with Centra to provide orthopedic services to Longwood student-athletes.

*The Board adjourned for lunch at approximately 12:05 p.m., and was addressed by men's basketball coach Jayson Gee. The Board reconvened at approximately 1:15 p.m.*

### **Reports from Representatives to the Board of Visitors**

Dr. Taylor, Faculty Representative, said the faculty is excited about the prospect of a campus-wide discussion of general education. He emphasized the importance of general education being both practical and preparing students for the unknown. He said while general education is often vague and easy at other institutions, at Longwood there is potential to be a place where general education is an exceptionally strong part of the curriculum.

Ms. Vest, Student Representative, reported positive student reviews of the new facilities at Lancer Park and updated progress on the voter registration initiative TurboVote. She urged continued efforts to encourage faculty to post more course material online. She reported students, while aware of and somewhat concerned about the athletic fees, are excited about the progress and potential of the athletics program.

Ms. Early, President of the Alumni Association, provided an update on the recovery from injuries of Nancy Shelton and on activities of the Alumni Association, including sports clinics in Northern Virginia, which it hopes to expand to other regions.

Mr. Burger, President of the Foundation Board, reported on a strong year for the Foundation, with receivables up significantly and the investment relationship with Spider Management proving successful. Only eight funds remain under water from before the financial crisis that began five years ago, and assets

are \$10 million higher than a year ago. He emphasized the potential of Hull Springs Farm for the University both in terms of educational opportunities and expected income from wetlands credits. He was asked about a recent decline in the total number of donors to the University. He said he would explore the reason, but expected the earlier-year numbers may have reflected a fundraising promotion at that time, and noted the total amount of donations last year was similar to that of 2006-07.

Mrs. Waller, Executive Director of the Real Estate Foundation, provided updates on the expansion at Lancer Park and the acquisition of a former lumber yard with retail and residential space, to provide valuable transitional space during other renovations and eventually a home for facilities management.

Hannah Ledger and Allison Dodson gave a brief presentation introducing the board to the work of the Staff Advisory Committee.

### **Student Affairs**

Dr. Pierson gave an overview of the scope of Student Affairs. He discussed changing student behavior issues, with students' psychological struggles a growing part of his work while behavioral discipline is declining.

A motion was presented to the Board for Approval of a Memorandum of Understanding by and between Longwood Counseling Center and Crossroads Community Services Board. The motion was approved unanimously. (A copy of the memorandum of understanding is included as Appendix 2.)

### **Facilities**

Mr. Bratcher provided an update on construction plans and projects, noting a figure of \$170 million of construction on campus since 1996. The University is considering undertaking another Campus Master Plan, which can be helpful in attracting state or private funding. This time, the University anticipates improving the process by conducting thorough space and infrastructure studies.

### **Discussion of Governance and Strategic Matters**

President Reveley addressed the importance of a residential college experience to Longwood's identity but also the importance of partnering in Farmville's economic development aspirations. He also emphasized the importance of the first two years of college for Longwood's retention goals. He said he believes the best balance of those goals would be to attempt to offer all freshmen and sophomores Longwood housing, while allowing developers to compete for the business of juniors and seniors. Such a change would likely require construction of a new sophomore dorm.

President Reveley fielded several questions from the Board and from students about the proposed change and possible new dormitory, which he said had been envisioned in the previous Master Plan. Dr. Gordon

was asked about the expected reaction of the town and he said he expected it to be very favorable. Other issues raised in the discussion included the potential for increased future demand due to growth of international and graduate students, and whether additional construction could endanger bond covenant occupancy requirements. Mr. Copeland expressed confidence the level of Longwood-owned housing demand would be strong.

Mrs. Maddux introduced a motion concerning the University's student housing policy: *"The University's student housing policy shall be revised to eliminate any requirements of University housing use for students beyond their first two years."* Mr. Mobley seconded the motion, and it was approved unanimously, with Dr. Gordon abstaining.

There was further discussion of housing issues, particularly related to the possible new sophomore dorm, and whether it might be possible to keep the Cunningham dorms open one more year. President Reveley said the Cunninghams would have a meaningful likelihood of experiencing system failures if continued in use beyond this academic year.

President Reveley raised before the Board the prospect of an evolving partnership between the Moton Museum and the University, pending possible action in the General Assembly to create a partnership similar to that between the Virginia Foundation for the Humanities and the University of Virginia. President Reveley and Mr. Ward spoke to the symbiotic relationship and potential for further collaboration – Longwood making further use of the museum's educational resources, and the museum, which has never been a collecting museum, making further use of Longwood's library and back-office resources. A closer partnership could also tap into the growing heritage tourism market and benefit the region.

President Reveley opened up the meeting, fielding several follow-up questions related to auxiliary cash reserves. There was discussion, chiefly involving Dr. Lehr and Ms. Vest, as well as other students in attendance, regarding the experience of Longwood students with collaborative learning, and possible ways to consider "how students learn" along with "what students learn" in the upcoming curriculum review.

Mr. O'Brion gave the board a short presentation concerning the requirements of the state's open meeting and Freedom of Information Act laws.

The Rector adjourned the day's session at approximately 5:30 p.m. The Board joined student peer mentors for dinner in Dorrill Dining Hall.

### *Saturday, September 14, 2013*

The Longwood University Board of Visitors resumed its meeting on Saturday September 14 at the University's new offices at 315 Third Street in Farmville for a wide-ranging and informal discussion of retention and graduation rate challenges and opportunities for improvement. All Board members from the Friday meeting were again present, joined by the University's deans as well as vice presidents. Following a tour of the new offices, President Reveley called the meeting to order at 10:00 a.m.



President Reveley reiterated that a systematic, cutting-edge effort to raise the University's retention and graduation rates is the foremost priority for Longwood. The first step is --- through discussion and subsequent study --- to understand the specifics of the issue at Longwood.

Chuck Ross, Dean of the College of Arts and Sciences, discussed summer programs, gateway courses and general education. Since the change to per-credit tuition charges, he said, he has seen more students taking 12 credits per semester rather than 15, in order to save money. Jennifer Green, associate vice president for enrollment management, said the change had caused the average course load to decrease 1 credit on average but that many students need to work. President Reveley expressed concern the change reduced the incentive for students to take exploratory courses. Mr. Copeland said he himself has received positive feedback from parents about the opportunity to pay per credit.

Dr. Gordon asked several questions regarding the relative leniency of Longwood's course repeat policy, and Ms. Vest expressed concern the policy could devalue the value of the GPA component of a Longwood resume. Mrs. Margiloff suggested general education requirements could be a more effective vehicle for helping students explore prospective majors. Dr. Lynch agreed that course credibility is important, but also said it's important that college be a time for second chances for students who struggle.

Mr. Mobley emphasized the importance of collecting institutional data. Dr. Lehr discussed opportunities for data-mining techniques to identify students most at-risk of not graduating. Dr. Green said Longwood has not effectively identified the students it needs to target. Dr. Lehr mentioned the work other institutions have done identifying risk factors to persistence. Mr. Johnson encouraged looking at success from international students and what might be learned from them.

President Reveley and Mrs. Radcliff thanked everyone for the candid and thoughtful discussion.

The meeting adjourned at 11:30 a.m. and was followed by lunch at Longwood House for those present along with department chairs.

# # #

**BOARD OF VISITORS  
AUDIT**

**INFORMATION ITEM**

**Update on Internal Audit and Institutional Compliance Activity**

Audits and Reviews

<b>Audit Plan FY 2014</b>	<b>Status</b>
Contract Management	In Progress
Student Union & Fraternity/Sorority Life (Student Interns)	Field Work Completed
Environmental Health & Safety	Beginning Spring Semester
Conference and Scheduling Follow-up	Beginning Spring Semester
Diversity & Inclusion / Leadership & Service Learning (Student Interns)	Beginning Spring Semester
Banner Finance	Placed on Hold (Vacant IT Auditor Position)
Information Technology – General Controls	Placed on Hold (Vacant IT Auditor Position)
IT Governance Follow-up	Placed on Hold (Vacant IT Auditor Position)
Information Technology – Lancer Card	Placed on Hold (Vacant IT Auditor Position)
Admissions Follow-up	Complete
Cashiering and Student Accounts Follow-up	Complete
LCVA Follow-up	Complete
Student Health and Wellness Follow-up	Complete
Fraud, Waste, Abuse Hotline Issues	2 Unsubstantiated

**Rationale:** Modification of Policy 1303 Reporting Fraud to the Auditor to include the requirement to report fraud to the State Inspector General.

# Policy 1303

## Reporting Fraud to the Auditor

### I. Purpose

The purpose of this policy is to provide procedures for handling all suspected incidences of fraud within the University.

### II. Policy

This institution establishes the following procedures for reporting fraud to the Internal Auditor.

### III. Procedure

1. Section 2.1-155.3 of the Code of Virginia requires the head of an agency or institution to notify the Auditor of Public Accounts (APA), *the State Inspector General, and the Superintendent of State Police* and ~~the Department of the State Police~~ of all incidences of fraud within their agency or institution.
2. In addition to compliance with the Code of Virginia, the institution should notify the Internal Audit Department in cases that circumstances suggest the possibility that assets have, or are thought to have, been lost through defalcation or other breaches in the financial and operating systems. Upon such notification, the Internal Audit Department should ensure that proper authorities within the institution have been notified and that they are aware of the reporting requirements under the Code of Virginia.
3. Although it is not mandatory that Internal Audit Department investigate each situation, it should be informed and make a judgment regarding the impact of the situation on internal controls and on future audit testing.

Approved by the Board of Visitors November 1988.

Revised and approved by the Board of Visitors, September 7, 2002.

**Rationale:** Modification of the Internal Audit Charter to include a definition of consulting services and suggestions from the Institute of Internal Auditors.

# Policy 1301

## Internal Auditor: Charter

**This charter identifies the purpose, authority, and responsibilities of the office of Internal Audit.**

The Longwood University Internal Audit Office reports functionally to the Board of Visitors and administratively to the President. Performance problems with the Internal Audit Department will be reported by the President to the Board of Visitors immediately. These reporting relationships ensure departmental independence, promote comprehensive audit coverage, and assure adequate consideration of audit recommendations.

### I. Purpose

*Internal Auditing is an independent and objective assurance and consulting activity that is guided by a philosophy of adding value to improve the operation of Longwood University. It assists Longwood University in accomplishing its objectives by bringing a systematic and disciplined approach to evaluate and improve the effectiveness of the University's risk management, control, and governance processes.* Internal Audit is an independent appraisal activity established within the University to examine and evaluate Longwood's management systems. University administration has the primary responsibility for establishing and maintaining a sufficient system of internal controls. Internal Audit assists University administration in the effective discharge of its responsibilities by furnishing evaluations of departmental activities, recommendations for improvements in systems and procedures, and other information designed to promote effective controls. *The Office of Internal Audit may provide "consulting services" which are advisory services. The nature and scope of the services are agreed upon with Longwood's management and are intended to add value and improve Longwood's operations.*

### II. Responsibilities

Meaningful internal auditing requires cooperation among the Internal Audit Office, University administration, and the auditee. Each party's responsibilities in this regard include but are not limited to the following:

1. Internal Audit Office
  1. Examine and evaluate the controls, policies and procedures, and systems in place to safeguard University assets.
  2. Evaluate the reliability and integrity of information, and the efficient and effective use of resources.
  3. Review compliance with policies, procedures, laws and regulations.
  4. Report results and make recommendations to administration and the Board of Visitors.

5. Assess the university risk management processes and bring any deficiencies or concerns to the attention of appropriate management personnel.
  6. Assist audit planning and scheduling activities with the Auditor of Public Accounts, Joint Legislative Audit and Review Commission, and other external audit or review organizations.
2. Administration
    1. Support the Internal Audit Office and communicate this support within their units.
    2. Participate in the audit process.
    3. Provide appropriate, clear, and consistent direction to the University community through written policies and procedures.
    4. Follow-up on progress of corrective actions for audit findings within their units.
  3. Auditee
    1. Cooperate with the audit process by providing unrestricted access to facilities, books and records, information, and personnel.
    2. Respond in writing, within 30 days, to all audit recommendations. Disagreements with recommendations or alternative solutions to identified findings are often acceptable. Each response should contain an estimated implementation date and responsible party.
    3. Implement agreed-upon corrective action programs.

### **III. Authorization**

In the course of its work, Internal Audit has full and complete direct access to all University books, records (manual and electronic), physical properties, and personnel relevant to the subject of review. All documents and information given to Internal Audit during their work will be handled in the same prudent manner that the University expects of the employees normally accountable for them. ***The internal audit activity will have free and unrestricted access to the Board of Visitors.***

The Internal Audit Office has neither direct responsibility for, nor authority over, any of the activities, functions, or tasks it reviews. Accordingly, Internal Audit does not develop or write policies or procedures that they may later be called upon to evaluate. They may review draft materials, developed by management, for propriety and/or completeness. However, ownership of, and responsibility for, these materials remains with management, not Internal Audit.

### **IV. Audit Standards And Ethics**

~~All audit work meets~~ ***The Office of Internal Audit's activities will be conducted in compliance with Longwood University's policies and procedures, as well as with*** the International Standards for the Professional Practice of Internal Auditing and Code of Ethics promulgated by the Institute of Internal Auditors, Inc. The department ***office*** is expected to consistently demonstrate high standards of conduct and ethics as well as appropriate judgment, independence, and discretion. Members maintain a professional image and protect auditee confidences and confidential information.

### **V. Selecting And Scheduling Audits**

The Director prepares an annual Internal Audit Plan for approval by the Board of Visitors. Candidate projects come from a risk assessment process, recommendations by senior administration, regular coverage of large functional operations (cashiering, accounts payable, etc), and special requests.

## **VI. Reporting**

All audit work is summarized in timely written reports distributed to an appropriate list of recipients. In general, reports are distributed to all members of the Board of Visitors, the President, the Vice President responsible for the auditee department, the Auditor of Public Accounts, as well as the auditee, their immediate supervisor, and other department heads affected by audit findings. Special request reports may have a more limited distribution.

Internal Audit will provide administration with adequate time to prepare responses to audit report findings before distributing the reports to appropriate recipients outside of University management.

A summary of all work performed during the current fiscal year will be prepared and presented to the Board of Visitors on a quarterly basis.

**Approved by the Board of Visitors, September 10, 2010.**

**Revised and approved by the Board of Visitors,**

## **CONSENT AGENDA**

### **Approval of Experiential Learning Policy**

**RATIONALE:** As recently as 1999, Longwood recognized the need for experiential learning as a component of the now defunct Bachelor of General Studies. Within the framework of that program, Longwood affirmed that "Credit for experiential learning may be requested for college level learning acquired through certain life/work experiences." This option was removed when the BGS Program was discontinued.

The new policy is needed to allow academic areas the flexibility to create non-traditional learning options for students in programs or situations where such options are deemed necessary and acceptable by the academic area.

**POLICY:** There are times when academic learning objectives may be satisfied completely outside the academic setting and still be compatible with academic work, thus worthy of academic credit. Care must be taken in order to establish that equivalent learning has occurred and that students are not being given credit for the same learning twice. Prior to entering the program students must be able to reasonably assess whether they will be awarded academic credit for their experiences. The Committee on Educational Policy, with the approval of the Faculty Senate, will maintain the process and forms required to ensure that programs that wish to have credit awarded for experiential learning have appropriate objectives, rubrics, and processes to satisfy this policy.

Experiential credit may not be used to satisfy General Education goals 1 - 10 or as part of the 30 credits of upper level courses required to be taken at Longwood.

## CONSENT AGENDA

### Approval of Guidelines on Award of Academic Credit for Military Education

The governing boards of each public institution of higher education shall, in accordance with guidelines developed by the State Council of Higher Education for Virginia, implement policies for the purpose of awarding academic credit to students for educational experience gained from service in the armed forces of the United States.

Longwood University is committed to serving the needs of its military and veteran populations. To that end, Longwood has reviewed its policies for the purpose of awarding academic credit to students for educational experiences gained from service in the armed forces and has developed the following policy to comply with the *Guidelines on Award of Academic Credit for Military Education, Training and Experience by Virginia Public Higher Education Institutions* (Code of Virginia 23-9.2:3.7 B).

Specifically, Longwood will:

1. Respect credit awarded by other accredited institutions to the greatest extent possible. A grade of a C or better is required for courses to be considered for transfer unless otherwise specified in an articulation agreement.
2. Award credit consistent with the American Council on Education (ACE) Guide to the Evaluation of Educational Experiences in the Armed Services and those transcribed by the Community College of the Air Force (CCAF) for which Longwood has comparable courses.
3. Award credit for successful performance on College Board College Level Examination Program (CLEP), Advanced Placement (AP) and International Baccalaureate (IB). Minimum required scores are posted on the website. Students may also receive credit for DSST or Excelsior College exams with appropriate scores if Longwood has a comparable course. Longwood also recognizes these credits as posted if included in an associate degree covered by an articulation agreement.
4. Award two hours of credit to all honorably discharged military students for PHED 101 (General Education Goal 11).
5. Require students to complete at least 25% of their degrees to include at least 30 credits at the upper level through Longwood. Students enrolling in the Nursing Program will most likely be required to complete more than 25% of their degree at Longwood. Academic residency requirements will be shared with students at acceptance.
6. Provide accepted students with unofficial evaluations of transfer credits at acceptance. After the student has indicated their intent to enroll and Longwood has received official transcripts, official evaluations will be available online. The Office of Registration will consistently award credit when course matches are obvious and when courses have been previously evaluated. Academic departments will evaluate credits at the request of the Office of Registration when they are unable to determine equivalencies.



7. Provide a mechanism for students not satisfied with the evaluation of any course. The student may complete a form available online and provide supporting documentation to include a course description to have the course reviewed. Explanations based on educationally grounded rationale will be provided in response to the submitted forms.

The policy above will be posted online as will the contact information for a designated staff member.

## CONSENT AGENDA

### Approval of Master of Education M.Ed. in School Librarianship

School Library Media has been offered as a concentration in the Master of Science in Education at Longwood University since Fall 1989. There has been encouragement from staff of the State Council of Higher Education for Virginia (SCHEV) that several highly productive concentrations within the M.S. in Education degree become stand-alone programs. School Librarianship is being proposed as the first of those stand-alone programs.

A new degree, the Master of Education (M.Ed) in School Librarianship, is proposed by the Department of Education and Special Education, which is housed in the College of Education and Human Services. Assuming approval by the State Council Higher Education in Virginia (SCHEV), implementation is planned for the Fall 2014 semester. The purpose of the program is to prepare teachers to be PreK-12 school librarians.

Longwood offers one of the two nationally recognized programs in Virginia preparing teachers to be school librarians.

The Integrated Postsecondary Education Data System now offers a Classification of Instructional Programs (CIP) code, 13.1334, for School Librarian/Library Media Specialist, defined as “A program that prepares individuals to serve as librarians and media specialists in elementary and secondary schools as well as special instructional centers.” Longwood’s new M.Ed. program would appropriately fit under this CIP code.

The proposed Master of Education in School Librarianship, scheduled to be implemented in Fall 2014, is fully aligned with the 2010 American Library Association and American Association of School Librarians (*ALA/AASL Standards for Initial Preparation of School Librarians*). The degree of Master of Education in School Librarianship will better reflect for graduates the true course of study that they have completed.

**CONSENT AGENDA**  
**INFORMATION ITEM**

**Animal Use and Care Committee**

Federal animal welfare regulations require that an Institutional Animal Care and Use Committee (IACUC) review and approve all activities involving the use of vertebrate animals prior to their initiation. This includes any animals used for the development of experimental methodologies, instructional purposes, research, etc.

Longwood must separate the current Human and Animal Research Committee into two separate committees because a number of grant funding agencies will not fund a grant if the institution does not have a standing Animal Care and Use Committee.

**RATIONALE:** The definitive source for internal control in the Commonwealth is the Agency Risk Management and Internal Control Standards (ARMICS). In conjunction with our agency-level internal control assessment, we need to ask questions relative to integrity and ethical behavior. Such questions are used to assess the institution's control environment. A University Code of Ethics policy will help define expectations in that regard. The current Policy #4110-Financial Operations Code of Ethics will be deleted. New policy language is indicated in bold italics. Language that is to be deleted is indicated with strikethroughs.

# *Policy 1000*

## *University Code of Ethics*

### *I. Purpose*

*The purpose of this statement/policy is to comply with the requirement for an ethics policy to be written by all agencies of the Commonwealth. This requirement is part of the Agency Risk Management and Internal Control Standards (ARMICS) implemented by the Virginia Department of Accounts.*

### *II. Statement/Policy*

*Longwood University is committed to lawful and ethical behavior in the performance of all its activities. We, as members of the Longwood community, will*

- Perform our public responsibilities ethically, competently, efficiently and honestly in observance of laws, regulations and policies applicable to university activities.*
- Protect and preserve university resources and ensure their proper use, with periodic auditing of functions and departments by the State Auditor of Public Accounts and/or Longwood's Internal Auditor to ensure that proper controls are in place and observed to safeguard public resources.*
- Avoid both conflicts of interest and the appearance of such conflicts, promptly disclosing conflicting interests or influences.*
- Make procurement decisions impartially and objectively, avoiding improper influence in the performance of our public duties.*
- Safeguard confidential information, ensuring that confidential records or other nonpublic information is not externally disclosed without appropriate authorization.*
- Maintain effective internal controls to prevent fraud, theft or the misuse of university funds or property, and to safeguard the integrity of our activities.*
- Treat others with dignity and respect, ensuring that no discrimination or harassment exists in carrying out university activities.*

- *Conduct communications on behalf of the university with all persons, including co-employees, clients, customers, students, guests and vendors, with professionalism and civility.*
- *Strive for continuous improvement in our performance of public duties for the University, mindful that our activities must be reasonable and appropriately authorized.*
- *Report any illegal or unethical action that comes to our attention, so that the university can investigate such actions and take corrective measures.*

Approved by the Board of Visitors,

**RATIONALE:** This policy is being updated to coincide with DOA requirements that state agencies are not required to control/track assets valued at less than \$5,000. Longwood's existing policy states our controllable threshold to be \$2,000. Modifications to this policy will coincide with DOA requirements and also lessen inventory tracking. New policy language is indicated in bold italics. Language that is to be deleted is indicated with strikethroughs.

# Policy 4204

## Fixed Assets Management

### I. Purpose

The University has a significant investment in fixed assets, such as land, buildings, fixed and moveable equipment, which are used to carry on the institution's mission and objectives. The purpose of this policy is to ensure that the University's fixed assets are acquired, safeguarded, controlled, disposed of, and accounted for in accordance with state and federal regulations, audit requirements, and generally accepted accounting principles.

### II. Policy

The Commonwealth Accounting Policies and Procedures (CAPP) Manual requires that all state agencies maintain an accurate inventory of fixed assets. Failure to maintain proper internal control over fixed assets could result in the University not achieving management standards if lack of control is determined to be a significant audit finding. Additionally, Office of Management and Budget Circular A-110: Uniform Administrative Requirements for Grants and Other Agreements with Institutions of Higher Education, Hospitals, and Other Non-Profit Organizations requires that the University maintain a detailed record of equipment and that no less than every two years a complete and accurate physical inventory be completed.

The University will comply with state and federal policies relative to fixed asset management. Instances where testing by Fixed Asset Accounting, Internal Audit or the Auditor of Public Accounts reveals an excessive amount of items not properly reflected in the fixed asset records will be reported to the President and area Vice President.

The Assistant Vice President for Financial Operations is responsible for the coordination, development and implementation of policies and procedures that comprise the university-wide fixed asset system. This system facilitates internal controls over the acquisition, disposal and inventory information of fixed assets, and enables the University to comply with federal and state regulations and meet regulatory or audit reporting requirements. Responsibility for maintaining the integrity of asset data in the system lies with the departmental fixed asset custodian, through proper notification of all changes to Fixed Assets Accounting. Updating the fixed asset system on a timely basis to record changes in the operational status, location or demographic information about fixed assets is the responsibility of Fixed Assets Accounting. Procedures and forms relative to fixed asset management are located on the Fixed Assets webpage.

#### 1. Fixed Asset Criteria

Fixed assets tracked in Longwood's asset system are divided into three categories: capital,

controllable and Equipment Trust Fund. Capital assets are those with an expected useful life greater than one year and a cost of \$5,000 or more. Controllable assets ~~are assets with a useful life of greater than one year and a cost between \$2,000 and \$4,999 and~~ **include** technology items ~~that meet either of the following criteria: (1) cost of \$500 or more; in which (2) theft or loss of such items would represents a significant risk to the~~ University (including, but not limited to, computers, netbooks, iPads, iPods, Kindles, iPhones or other mobile technology). This requirement does not apply to portable media such as USB drives. Equipment Trust Fund (ETF) assets are those costing \$500 or more and funded by bonds issued through the Virginia College Building Authority (VCBA).

Items representing construction in progress are not entered into the fixed asset system until the construction or renovation is substantially complete. The classification of a renovation as a fixed asset depends upon the significance of the renovation to the structure.

2. Fixed Asset Classifications and Capitalization Thresholds

1. **Land** - Real estate without any land improvements.  
Capitalization Threshold: \$5,000
2. **Infrastructure**- Improvements not specifically identifiable to an individual building, to include parking lots, fencing, sidewalks, irrigation/drainage systems, tunnels, signs and lighting. Capitalization Threshold: \$5,000
3. **Buildings** - Real estate used for shelter, dwelling or other similar agency purposes.  
Capitalization Threshold: \$5,000
4. **Building Improvements** - Improvements subsequent to initial building construction.  
Capitalization Threshold: \$100,000
5. **Construction In Progress** - Temporary capitalization of labor, materials and equipment of buildings or other capital assets/projects that are being constructed.  
Capitalization Threshold: \$5,000
6. **Equipment** - Fixed equipment includes equipment affixed to the building; moveable equipment includes office furniture, fixtures, machines, window air conditioning units, medical, laundry, and kitchen equipment, and vehicles.  
Equipment Capitalization Threshold: \$5,000

Fixed Equipment Improvements/Replacements Capitalization Threshold: \$50,000

7. **Library Books**- Periodicals, journals, books of reference and other books for use in libraries. Capitalized at actual cost of acquisition.
8. **Intangible Assets** - Include software, patents, trademarks, copyrights, land and water use rights, easements and right-of-ways.  
Software Capitalization Threshold: \$25,000

Other Intangibles Capitalization Threshold: \$100,000

3. Equipment Trust Fund (ETF) Program Assets -

The ETF Program provides funding that allows higher education institutions to purchase equipment for instructional use. Equipment purchased with ETF funds is not owned by the University, but is tied to facilities agreements with the Virginia College Building

Authority (VCBA). Once a facilities agreement has been satisfied, ownership passes to the University. In addition to general rules applicable to all equipment, specific guidelines apply to the acquisition, maintenance, and disposal of ETF equipment. ETF equipment:

1. Must be used in programs of instruction, research and academic support throughout its useful life or until ownership passes to Longwood.
  2. Is eligible for surplus only after ownership passes to Longwood.
  3. Must be replaced with departmental funds if lost or stolen.
  4. Must be an individual item that costs at least \$500 or must be a functional unit where the aggregate cost of individual components is \$500 or greater. Components of a functional unit perform a specific task and must remain assembled as a unit.
  5. Must be decaled within 45 days of receipt for identification and tracking purposes.
  6. Must be maintained in good working condition by the department and must be physically located in accordance with fixed asset records.
4. Fixed Asset Ownership and Custody  
Each department is responsible for designating a fixed asset custodian. This individual is responsible for accurately maintaining the fixed asset inventory for the department. All fixed assets are owned by the University and not by a specific individual, department or other operating unit. Generally, the University has sole ownership of all equipment acquired regardless of source of funding or method of acquisition with the following exceptions:
1. Equipment acquired through sponsored projects where the federal government or other sponsor retains title to the equipment or where the sponsor furnishes equipment merely for the duration of the project;
  2. Equipment on short-term loan from another institution;
  3. Leased equipment;
  4. Equipment Trust Fund equipment until terms of Facilities Agreement are met
5. Inventory of Fixed Assets  
Fixed asset custodians are responsible for conducting an annual inventory within their respective department. Inventory listings are provided once a year by the Fixed Assets Accounting Office from the University's inventory system. The custodian is responsible for ensuring that asset information is correct, providing information to update the fixed asset system to reflect necessary changes, and completing a "Certification of Completion" form indicating that the inventory has been completed and is accurate.
6. Acquisition/Addition of Fixed Assets  
The "Addition to Fixed Assets Inventory" form must be completed by the fixed asset custodian to document fixed assets acquired through donation, fabrication, transfer from other universities or agencies, or simply found in the department and not listed on the department's inventory report. The form must be submitted electronically to Fixed Assets Accounting within five days of receipt (or discovery) of the fixed asset. Capital Planning is responsible for providing information concerning construction and renovations, excluding equipment.

Departments receiving a gift-in-kind (gifts other than cash and securities) should notify



the Foundation immediately upon receipt, as failure to comply with IRS regulations could result in a loss of the tax deduction to the donor and/or penalties to the University.

7. Fixed Asset Tagging

Materiel Management personnel are responsible for the physical tagging of University assets. Assets meeting the criteria are identified with tags that are affixed to the asset unless not physically practicable. Assets purchased with University funds are identified by a blue Longwood University asset tag. Assets purchased with ETF funds are identified with a red Longwood University asset tag. Items needing to be re-tagged are issued a white polyester tag. Assets may also be engraved. Assets that do not have tags or engraving are identified as such in the fixed asset system.

8. Disposal or Transfer of Fixed Assets

Fixed asset custodians are responsible for safeguarding all equipment and other fixed assets assigned to their department, including items no longer needed, until the Surplus Property Report is signed and the items have been removed by Materiel Management or a completed transfer form is received by Fixed Assets Accounting. Custodians are responsible for recording any disposals or transfers of assets by completing and submitting required forms within five days of disposal or transfer. Unallowable and allowable disposals and transfers include:

1. **Unallowable disposals and transfers**

1. Sale of assets by a department (permitted through surplus property only)
2. Gift or transfer outside of the University (except for federal research equipment which may be transferred with appropriate federal approval)

2. **Allowable disposals and transfers**

1. Stolen assets (Theft to be reported to Campus Police.)
2. Assets destroyed (Loss due to fire, flood, etc. to be reported to Risk Management.)
3. Surplus property
4. Trade-in for new equipment
5. Transfers to other University departments or other state agencies/institution

9. Transfer of Fixed Assets to Offsite Locations

Equipment may be utilized off campus for **University business only**, when appropriately authorized. Authorization does **not** grant permission for personal use, use by third-party contractors, or use for non-University purposes. Offsite equipment is subject to the same University and Commonwealth rules and custodial responsibilities as on-premise equipment. The custodian for each department is responsible for maintaining the appropriate records to track the location of any equipment that is being utilized away from University premises.

10. Depreciation/Amortization of Fixed Assets

The University uses the straight-line method of depreciation/amortization for all depreciable/amortizable fixed assets (land and construction-in-progress are not depreciated). Useful lives are based on information provided by the Commonwealth Accounting Policies and Procedures (CAPP) Manual. Useful lives are subject to modification if facts and circumstances at the University differ from these guidelines.

Approved by the Board of Visitors, December 2, 2011.

Revised and approved by the Board of Visitors, June 15, 2012.

Revised and approved by the Board of Visitors, December 7, 2012.

**Six-Year Plans - Part I (2013): 2014-16 through 2018-20**

**Due: July 1, 2013**

**Institution:**

**Institution UNITID:**

**Individual responsible for plan**

<b>Name:</b>	W. Taylor Reveley, IV - President
<b>Email address:</b>	reveleywf@longwood.edu
<b>Telephone number:</b>	434-395-2001

**Six-Year Plans - Part I (2013): 2014-16 through 2018-20**  
**Longwood University**  
 ACADEMIC AND FINANCIAL PLAN

Instructions: In the column entitled "Academic and Support Service Strategies for Six-Year Period (2014-2020)," please provide title to identify strategies (for the three biennia of this six-year period) associated with each objective of the "Preparing for the Top Jobs of the 21<sup>st</sup> Century: The Virginia Higher Education Opportunity Act of 2011." Please use this title to identify a more detailed description of the strategy in the separate Word document.

Priority Ranking	Strategies (Short Title)	TJ21 Objectives	ACADEMIC AND SUPPORT SERVICE STRATEGIES FOR SIX-YEAR PERIOD (2014-2020)						Strategies	Strategies				
			Biennium: 2014-2016 (7/1/14-6/30/16)		Biennium: 2016-2018 (7/1/16-6/30/18)		Biennium: 2018-2020 (7/1/18-6/30/20)							
			Cost: Incremental, Savings, Reallocation		Cost: Incremental, Savings, Reallocation		Cost: Incremental, Savings, Reallocation							
2014-2015		2015-2016		2014-2015		2015-2016		2014-2015		2015-2016				
Amount		Within Increase		Amount		Within Increase		Amount		Within Increase				
1	Improve Retention and Graduation Rates	E5	Incremental:	\$1,000,000	\$1,000,000	\$0	\$0	\$0	\$0					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
2	Enhance Student Success Program	E5	Incremental:	\$142,810	\$142,810	\$285,621	\$285,621	\$285,621	\$285,621					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
2	Implement the Quality Enhancement Plan (QEP)	E12	Incremental:	\$0	\$0	\$200,000	\$200,000	\$200,000	\$200,000					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
2	Implement a New Degree Audit System	E3	Incremental:	\$0	\$0	\$0	\$0	\$0	\$0					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
2	Review and Revise General Education Requirements	E3	Incremental:	\$125,000	\$125,000	\$0	\$0	\$0	\$0					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
5	5-Year (4+1) Masters in Math/Science Secondary Teaching	E4, E6	Incremental:	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
5	Explore the Development of New Health Profession Degrees	D, E6	Incremental:	\$0	\$0	\$0	\$0	\$0	\$0					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
7	Develop a RN to BSN Program	D, E6	Incremental:	\$30,000	\$30,000	\$0	\$0	\$124,548	\$124,548					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
7	Hire Essential Staff for Expanding BS in Nursing Program	E6	Incremental:	\$104,804	\$104,804	\$104,804	\$104,804	\$104,804	\$104,804					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
6	Expand the Cyber Security Initiative	E6	Incremental:	\$130,000	\$130,000	\$130,000	\$130,000	\$130,000	\$130,000					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
6	Implement the Center for Excellence in Environmental Education (CEE) Initiative	D, E6	Incremental:	\$0	\$0	\$119,488	\$119,488	\$119,488	\$119,488					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$112,524	\$112,524	\$0	\$0	\$112,524	\$112,524	\$0				
6	Expand Undergraduate Research in the Sciences	E6	Incremental:	\$0	\$0	\$0	\$0	\$0	\$0					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
3	Additional Faculty Positions	E1	Incremental:	\$176,952	\$176,952	\$353,904	\$353,904	\$353,904	\$353,904					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
3	Admissions Counselors	E1	Incremental:	\$30,264	\$30,264	\$60,528	\$60,528	\$60,528	\$60,528					
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0				

**Six-Year Plans - Part I (2013): 2014-16 through 2018-20**  
**Longwood University**  
 ACADEMIC AND FINANCIAL PLAN

Instructions: In the column entitled "Academic and Support Service Strategies for Six-Year Period (2014-2020)," please provide title to identify strategies (for the three biennia of this six-year period) associated with each objective of the "Preparing for the Top Jobs of the 21<sup>st</sup> Century. The Virginia Higher Education Opportunity Act of 2011." Please use this title to identify a more detailed description of the strategy in the separate Word document.

Priority Ranking	Strategies (Short Title)	TJ21 Objectives	ACADEMIC AND SUPPORT SERVICE STRATEGIES FOR SIX-YEAR PERIOD (2014-2020)						Biennium 2014-2016 (7/1/14-6/30/16)		Biennium 2016-2018 (7/1/16-6/30/18)		Biennium 2018-2020 (7/1/18-6/30/20)			
			Cost Incremental, Savings, Reallocation			2015-2016			2014-2015		2014-2016		Strategies		Strategies	
			Amount	Within Increase	Amount	Amount	Within Increase	Amount	Within Increase	Amount	Within Increase	Amount	Within Increase	Strategies	Strategies	
	Explore Offering Dual Enrollment Pre-Education Courses	D, E3	Incremental: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	Explore Offering Dual Enrollment Pre-Education Courses.					
			Savings: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
			Reallocation: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
	Develop Cooperative Agreement with SVCC	C	Incremental: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
			Savings: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
			Reallocation: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
	Develop Off-Site Programs and Clinical Placements	D, E1	Incremental: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	Continue to support the addition of degree program offerings in underserved remote rural areas.					
			Savings: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
			Reallocation: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
	Develop a Collaborative Early Childhood Inclusive Program	D, E1	Incremental: \$88,476	\$88,476	\$88,476	\$88,476	\$88,476	\$88,476	\$88,476	\$88,476	Continue Collaborative Early Childhood Inclusive Program. Hire a second faculty member.					
			Savings: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
			Reallocation: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
	Develop a MS Degree in Social Work	D, E1	Incremental: \$0	\$0	\$0	\$94,488	\$94,488	\$94,488	\$94,488	\$94,488	Continue MS Degree in Social Work.					
			Savings: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
			Reallocation: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
	Initiate a Graphic Design Animation and Simulation Program	D, E6	Incremental: \$188,976	\$188,976	\$188,976	\$188,976	\$188,976	\$188,976	\$188,976	\$188,976	Continue Graphic Design Animation and Simulation Program.					
			Savings: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
			Reallocation: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
	Expand Faculty Resources in Therapeutic Recreation	E6	Incremental: \$94,488	\$94,488	\$94,488	\$94,488	\$94,488	\$94,488	\$94,488	\$94,488	Continue funding of additional faculty position required to expand Therapeutic Recreation Program.					
			Savings: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
			Reallocation: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
	Optimal Year-Round Use of Facilities and Resources	B, E3	Incremental: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	Expand J-Term.					
			Savings: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
			Reallocation: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
	Development of Instructional Resource-Sharing with Other Institutions in the Commonwealth	C, E8	Incremental: \$0	\$0	\$0	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	Develop a Collaborative Research Program with other institutions. A director will be hired in 2016-18 to oversee and coordinate the operation of the collaborative program.					
			Savings: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
			Reallocation: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
	Increase Technology-Enhanced Instruction, Including Course Redesign, Online Instruction, and Resource Sharing Among Institutions	E10	Incremental: \$90,000	\$90,000	\$90,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	Continue funding distance learning initiatives.					
			Savings: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
			Reallocation: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
	Increase Research, Including Regional and Public-Private Collaboration	EB	Incremental: \$55,000	\$55,000	\$55,000	\$240,049	\$240,049	\$240,049	\$240,049	\$240,049						
			Savings: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
			Reallocation: \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
<b>Total 2014-2016 Costs</b>			\$2,311,770	\$2,311,770	\$2,420,370	\$2,420,370	\$2,420,370	\$2,420,370	\$2,420,370	\$2,420,370						
<b>Incremental (Included in Financial Plan line 61)</b>			\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
<b>Savings</b>			\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0						
<b>Reallocation</b>			\$282,524	\$0	\$202,524	\$0	\$0	\$0	\$0	\$0						

**Six-Year Plans - Part I (2013): 2014-16 through 2018-20**  
**Longwood University**  
 ACADEMIC AND FINANCIAL PLAN

Instructions: In the column entitled "Academic and Support Service Strategies for Six-Year Period (2014-2020)," please provide title to identify strategies (for the three biennia of this six-year period) associated with each objective of the "Preparing for the Top Jobs of the 21<sup>st</sup> Century: The Virginia Higher Education Opportunity Act of 2011." Please use this title to identify a more detailed description of the strategy in the separate Word document.

Priority Ranking	Strategies (Short Title)	ACADEMIC AND SUPPORT SERVICE STRATEGIES FOR SIX-YEAR PERIOD (2014-2020)				Strategies	Strategies	
		Biennium 2014-2016 (7/1/14-6/30/16)		Biennium 2016-2018 (7/1/16-6/30/18)				Biennium 2018-2020 (7/1/18-6/30/20)
		Cost: Incremental, Savings, Reallocation		Cost: Incremental, Savings, Reallocation				
2014-2015		2015-2016		2014-2016				
Amount		Within Increase		Amount		Within Increase		

**Six-Year Financial Plan for Educational and General Programs, Incremental Operating Budget Need**

2014-2016 Biennium  
 (Assuming No Additional General Fund)

Items	2014-2015		2015-2016	
	Amount	Within Increase	Amount	Within Increase
<b>Total Incremental Cost from Academic Plan<sup>3</sup></b>	\$2,311,770	\$2,311,770	\$2,420,370	\$2,420,370
Increase Faculty Salaries <sup>1</sup>	\$0	\$0	\$0	\$0
Faculty Salary Increase Rate <sup>2</sup>	0.00%	0.00%	0.00%	0.00%
Increase number of Full-Time Faculty (FTE) <sup>4</sup>	8.00	8.00	13.00	13.00
Increase number of Administrative Professional (FTE) <sup>4</sup>	3.00	3.00	7.00	7.00
Increase number of Classified Staff -Other( FTE) <sup>4</sup>	0.00	0.00	0.00	0.00
O&M for New Facilities (\$)	\$79,763	\$79,763	\$106,350	\$106,350
O&M for New Facilities (FTE)	1.00	1.00	1.00	1.00
Utility Cost Increase	\$100,000	\$100,000	\$200,000	\$200,000
NGF share of state authorized salary increase/bonus	\$0	\$0	\$0	\$0
NGF share of state health insurance benefit increase	\$350,000	\$350,000	\$700,000	\$700,000
VRS increase	\$0	\$0	\$0	\$0
Additional In-State Student Financial Aid From Tuition Revenue (Honors)	\$80,000	\$80,000	\$80,000	\$80,000
Other Fixed Costs (maintenance contracts, etc.)	\$300,000	\$300,000	\$600,000	\$600,000
Faculty Equity, Retention & Promotion Pool; A/P and Classified Equity & Retention Pool <sup>3</sup>	\$600,000	\$600,000	\$1,200,000	\$1,200,000
<b>Total Additional Funding Need</b>	<b>\$3,821,533</b>	<b>\$3,821,533</b>	<b>\$5,306,720</b>	<b>\$5,306,720</b>

- Notes:
- (1) If planned, enter the cost of any institution-wide increase.
  - (2) Enter planned annual faculty salary increase rate. Any salary increase entered here will be counted when calculating the gap to reach the 60th percentile in the future.
  - (3) A pool of funds will be established to be used to address salary compression issues, promotion, as well as funds to retain high-quality faculty and staff who have been offered positions outside of the University. Some employees may receive no increase and others will receive varying amounts - these funds will not be given to faculty or staff across-the-board. A salary study was conducted by an outside firm in 2012. Results of this study will be utilized to determine who would be eligible for an increase. This represents the third and fourth years of a multi-year plan to address salary issues.
  - (4) Position costing reflected in respective Academic strategy within the Academic and Finance Plan Section.

# Six-Year Plans - Part I (2013): 2014-16 through 2018-20

## Longwood University

### Six-Year Financial Plan for Tuition and Fee Increases and Nongeneral Fund Revenue Estimates

Items	2012-2013 (Actual)			2013-2014 (Estimated)			2014-2015 (Planned)			2015-2016 (Planned)		
	Student Charge	Total Revenue	Rate Increase	Student Charge	Total Revenue	Rate Increase	Student Charge	Total Revenue	Rate Increase	Student Charge	Total Revenue	Rate Increase
<b>E&amp;G Programs</b>												
Undergraduate, In-State	\$6,180	\$24,849,420	4.4%	\$6,450	\$25,963,055	4.4%	\$7,230	\$29,129,657	12.1%	\$7,530	\$30,340,427	4.1%
Undergraduate, Out-of-State	\$18,510	\$3,185,062	4.4%	\$19,320	\$3,730,641	4.4%	\$21,270	\$4,120,866	10.1%	\$22,110	\$4,286,686	3.9%
Graduate, In-State	\$6,648	\$1,978,992	4.3%	\$6,936	\$1,839,249	4.3%	\$7,776	\$2,068,684	12.1%	\$8,088	\$2,153,017	4.0%
Graduate, Out-of-State	\$18,912	\$260,768	4.3%	\$19,728	\$256,479	4.3%	\$21,744	\$283,443	10.2%	\$22,608	\$294,999	4.0%
Other E&G Revenue		\$2,251,750			\$2,229,950			\$2,238,257			\$2,250,965	
Total E&G Revenue - Gross		\$32,525,992			\$34,019,374			\$37,840,907			\$39,326,094	
Total E&G Revenue - Net of Financial Aid		\$30,979,535			\$32,199,374			\$35,940,907			\$37,426,094	
<b>Auxiliary Program</b>												
Mandatory Non-E&G Fees												
Undergraduate	\$4,710		3.8%	\$4,890		3.8%	\$5,040		3.1%	\$5,190		3.0%
Graduate	\$2,952		4.1%	\$3,072		4.1%	\$3,144		2.3%	\$3,216		2.3%
Total Auxiliary Revenue (ALL including room and board)		\$46,130,871			\$48,622,181			\$50,213,379			\$51,845,076	
<b>Total Tuition and Fees</b>												
Undergraduate, In-State	\$10,890		4.1%	\$11,340		4.1%	\$12,270		8.2%	\$12,720		3.7%
Undergraduate, Out-of-State	\$23,220		4.3%	\$24,210		4.3%	\$26,310		8.7%	\$27,300		3.8%
Graduate, In-State	\$9,600		4.3%	\$10,008		4.3%	\$10,920		9.1%	\$11,304		3.5%
Graduate, Out-of-State	\$21,864		4.3%	\$22,800		4.3%	\$24,888		9.2%	\$25,824		3.8%
<b>Student Financial Aid</b>		\$1,546,457			\$1,820,000			\$1,900,000			\$1,900,000	
<b>Sponsored Programs (Program 110)</b>		\$3,178,393			\$3,178,393			\$3,178,393			\$3,178,393	
<b>Unique Military Activities</b>		\$0			\$0			\$0			\$0	
<b>Workforce Development</b>		\$0			\$0			\$0			\$0	
<b>Other (Specify)</b>		\$0			\$0			\$0			\$0	

# Six-Year Plans - Part I (2013): 2014-16 through 2018-20

## Longwood University

### FINANCIAL AID PLAN

Note: If you do not have actual amounts for Tuition Revenue for Financial Aid by student category, please provide an estimate. If values are not distributed for Tuition Revenue for Financial Aid, a distribution may be calculated for your institution.

### Allocation of Tuition Revenue Used for Student Financial Aid

#### 2011-12 (Actual)

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid *	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$23,941,760	\$1,336,587	5.6%	\$1,506,734
Undergraduate, Out-of-State	\$3,708,129	\$207,012	5.6%	\$155,250
Graduate, In-State	\$1,895,762	\$105,834	5.6%	\$0
Graduate, Out-of-State	\$224,821	\$12,551	5.6%	\$0
Total	\$29,770,472	\$1,661,984	5.6%	\$1,661,984
In-State Sub-Total	\$25,837,522	\$1,442,421	5.6%	\$1,506,734

#### 2012-13 (Estimated)

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid *	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$24,849,420	\$1,269,349	5.1%	\$1,388,897
Undergraduate, Out-of-State	\$3,185,062	\$162,698	5.1%	\$157,560
Graduate, In-State	\$1,978,992	\$101,090	5.1%	\$0
Graduate, Out-of-State	\$260,768	\$13,320	5.1%	\$0
Total	\$30,274,242	\$1,546,457	5.1%	\$1,546,457
Total from Finance-T&F worksheet	\$32,525,992	\$1,546,457	4.8%	
In-State Sub-Total	\$26,828,412	\$1,370,439	5.1%	\$1,388,897



**2013-14 (Planned)**

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid *	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$25,963,055	\$1,486,430	5.7%	\$1,662,000
Undergraduate, Out-of-State	\$3,730,641	\$213,586	5.7%	\$158,000
Graduate, In-State	\$1,839,249	\$105,300	5.7%	\$0
Graduate, Out-of-State	\$256,479	\$14,684	5.7%	\$0
Total	\$31,789,424	\$1,820,000	5.7%	\$1,820,000
Total from Finance-T&F worksheet	\$34,019,374	\$1,820,000	5.3%	
In-State Sub-Total	\$27,802,304	\$1,591,730	5.7%	\$1,662,000
Additional In-State	\$973,892	\$221,291	22.7%	\$273,103

**2014-15 (Planned)**

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid *	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$29,129,657	\$1,551,691	5.3%	\$1,742,000
Undergraduate, Out-of-State	\$4,120,866	\$222,859	5.4%	\$158,000
Graduate, In-State	\$2,068,684	\$110,137	5.3%	\$0
Graduate, Out-of-State	\$283,443	\$15,313	5.4%	\$0
Total	\$35,602,650	\$1,900,000	5.3%	\$1,900,000
Total from Finance-T&F worksheet	\$37,840,907	\$1,900,000	5.0%	
In-State Sub-Total	\$31,198,341	\$1,661,828	5.3%	\$1,742,000
Additional In-State	\$3,396,037	\$70,098	2.1%	\$80,000
Additional In-State from Financial Plan		\$80,000	#DIV/0!	

2015-16 (Planned)				
T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid *	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$30,340,427	\$1,552,386	5.1%	\$1,742,000
Undergraduate, Out-of-State	\$4,286,686	\$222,812	5.2%	\$158,000
Graduate, In-State	\$2,153,017	\$109,617	5.1%	\$0
Graduate, Out-of-State	\$294,999	\$15,185	5.1%	\$0
Total	\$37,075,129	\$1,900,000	5.1%	\$1,900,000
Total from Finance-T&F worksheet	\$39,326,094	\$1,900,000	4.8%	
In-State Sub-Total	\$32,493,444	\$1,662,003	5.1%	\$1,742,000
Additional In-State	\$1,295,103	\$175	0.0%	\$0
Additional In-State from Financial Plan		\$80,000	#DIV/0!	

\* As Longwood University cannot report with certainty sources specifically allocable by student category, the "Tuition Revenue for Financial Aid" amounts were calculated on the basis of proportional gross tuition revenue.

## Six-Year Plans - Part I (2013): 2014-16 through 2018-20 Longwood University

Foregone Tuition Revenue As A Result of Tuition Waivers (See references at bottom of tables for waiver programs)  
Educational and General Programs

The values entered for 2011-12 must match those submitted on the SCHEV S1/S2.									
Program	2011-12 (Actual from S1/S2)								
	In-State			Out-of-State					Total
	Undergraduate	Graduate	Total	Undergraduate	Graduate	Total	Undergraduate	Graduate	Total
Unfunded Scholarships	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Foreign exchange student waivers	\$0	\$0	\$0	\$55,950	\$0	\$55,950	\$0	\$0	\$55,950
Virginia's military dependent waivers	\$66,955	\$2,238	\$69,193	\$0	\$0	\$69,193	\$0	\$0	\$69,193
Virginia's military member waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia's military veteran waivers									
Federal military member and dependent waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia provision for other state's National Guard duty									
Special arrangement contracts	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Academic Common Market	\$0	\$0	\$0	\$32,982	\$0	\$32,982	\$0	\$0	\$32,982
Geographic waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other waivers associated with in-/out-of-state differential	\$0	\$0	\$0	\$52,643	\$0	\$52,643	\$0	\$0	\$52,643
Senior Citizen's Tuition and Fee Waivers	\$8,607	\$4,446	\$13,053	\$0	\$0	\$13,053	\$0	\$0	\$13,053
Certain Public Safety Personnel Child/Spouse Waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia Military Survivors & Dependents Education Program	\$112,740	\$1,536	\$114,276	\$0	\$0	\$114,276	\$0	\$0	\$114,276
Employee Waivers	\$15,815	\$37,882	\$53,697	\$0	\$0	\$53,697	\$0	\$0	\$53,697
Other waivers of tuition/fees student would normally be charged	\$78,909	\$29,151	\$108,060	\$0	\$0	\$108,060	\$0	\$0	\$108,060
<b>Total</b>	<b>\$283,026</b>	<b>\$75,253</b>	<b>\$358,279</b>	<b>\$141,575</b>	<b>\$0</b>	<b>\$141,575</b>	<b>\$0</b>	<b>\$0</b>	<b>\$499,854</b>

2012-13 (Estimated)

Program	In-State			Out-of-State			Total
	Undergraduate	Graduate	Total	Undergraduate	Graduate	Total	
Unfunded Scholarships	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Foreign exchange student waivers	\$0	\$0	\$0	\$56,000	\$0	\$56,000	\$56,000
Virginia's military dependent waivers	\$70,000	\$3,000	\$73,000	\$0	\$0	\$0	\$73,000
Virginia's military member waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia's military veteran waivers							
Federal military member and dependent waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia provision for other state's National Guard duty	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Special arrangement contracts	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Academic Common Market	\$0	\$0	\$0	\$33,000	\$0	\$33,000	\$33,000
Geographic waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other waivers associated with in-/out-of-state differential	\$0	\$0	\$0	\$54,000	\$0	\$54,000	\$54,000
Senior Citizen's Tuition and Fee Waivers	\$9,000	\$5,000	\$14,000	\$0	\$0	\$0	\$14,000
Certain Public Safety Personnel Child/Spouse Waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia Military Survivors & Dependents Education Program	\$115,000	\$2,000	\$117,000	\$0	\$0	\$0	\$117,000
Employee Waivers	\$17,000	\$38,000	\$55,000	\$0	\$0	\$0	\$55,000
Other waivers of tuition/fees student would normally be charged	\$83,000	\$30,000	\$113,000	\$0	\$0	\$0	\$113,000
<b>Total</b>	<b>\$294,000</b>	<b>\$78,000</b>	<b>\$372,000</b>	<b>\$143,000</b>	<b>\$0</b>	<b>\$143,000</b>	<b>\$515,000</b>

2013-14 (Planned)

Program	In-State			Out-of-State			Total
	Undergraduate	Graduate	Total	Undergraduate	Graduate	Total	
Unfunded Scholarships	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Foreign exchange student waivers	\$0	\$0	\$0	\$58,000	\$0	\$58,000	\$58,000
Virginia's military dependent waivers	\$72,000	\$3,000	\$75,000	\$0	\$0	\$0	\$75,000
Virginia's military member waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia's military veteran waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Federal military member and dependent waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia provision for other state's National Guard duty	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Special arrangement contracts	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Academic Common Market	\$0	\$0	\$0	\$34,000	\$0	\$34,000	\$34,000
Geographic waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other waivers associated with in-/out-of-state differential	\$0	\$0	\$0	\$55,000	\$0	\$55,000	\$55,000
Senior Citizen's Tuition and Fee Waivers	\$10,000	\$5,000	\$15,000	\$0	\$0	\$0	\$15,000
Certain Public Safety Personnel Child/Spouse Waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia Military Survivors & Dependents Education Program	\$118,000	\$2,000	\$120,000	\$0	\$0	\$0	\$120,000
Employee Waivers	\$19,000	\$39,000	\$58,000	\$0	\$0	\$0	\$58,000
Other waivers of tuition/fees student would normally be charged	\$86,000	\$31,000	\$117,000	\$0	\$0	\$0	\$117,000
<b>Total</b>	<b>\$305,000</b>	<b>\$80,000</b>	<b>\$385,000</b>	<b>\$147,000</b>	<b>\$0</b>	<b>\$147,000</b>	<b>\$532,000</b>

2014-15 (Planned)

Program	In-State			Out-of-State			Total
	Undergraduate	Graduate	Total	Undergraduate	Graduate	Total	
Unfunded Scholarships	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Foreign exchange student waivers	\$0	\$0	\$0	\$60,000	\$0	\$60,000	\$60,000
Virginia's military dependent waivers	\$73,000	\$4,000	\$77,000	\$0	\$0	\$0	\$77,000
Virginia's military member waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia's military veteran waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Federal military member and dependent waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia provision for other state's National Guard duty	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Special arrangement contracts	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Academic Common Market	\$0	\$0	\$0	\$35,000	\$0	\$35,000	\$35,000
Geographic waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other waivers associated with in-/out-of-state differential	\$0	\$0	\$0	\$56,000	\$0	\$56,000	\$56,000
Senior Citizen's Tuition and Fee Waivers	\$11,000	\$5,000	\$16,000	\$0	\$0	\$0	\$16,000
Certain Public Safety Personnel Child/Spouse Waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia Military Survivors & Dependents Education Program	\$121,000	\$2,000	\$123,000	\$0	\$0	\$0	\$123,000
Employee Waivers	\$21,000	\$40,000	\$61,000	\$0	\$0	\$0	\$61,000
Other waivers of tuition/fees student would normally be charged	\$89,000	\$32,000	\$121,000	\$0	\$0	\$0	\$121,000
<b>Total</b>	<b>\$315,000</b>	<b>\$83,000</b>	<b>\$398,000</b>	<b>\$151,000</b>	<b>\$0</b>	<b>\$151,000</b>	<b>\$549,000</b>

2015-16 (Planned)

Program	In-State			Out-of-State			Total
	Undergraduate	Graduate	Total	Undergraduate	Graduate	Total	
Unfunded Scholarships	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Foreign exchange student waivers	\$0	\$0	\$0	\$62,000	\$0	\$62,000	\$62,000
Virginia's military dependent waivers	\$75,000	\$4,000	\$79,000	\$0	\$0	\$0	\$79,000
Virginia's military member waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia's military veteran waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Federal military member and dependent waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia provision for other state's National Guard duty	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Special arrangement contracts	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Academic Common Market	\$0	\$0	\$0	\$36,000	\$0	\$36,000	\$36,000
Geographic waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other waivers associated with in-/out-of-state differential	\$0	\$0	\$0	\$57,000	\$0	\$57,000	\$57,000
Senior Citizen's Tuition and Fee Waivers	\$12,000	\$5,000	\$17,000	\$0	\$0	\$0	\$17,000
Certain Public Safety Personnel Child/Spouse Waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia Military Survivors & Dependents Education Program	\$124,000	\$2,000	\$126,000	\$0	\$0	\$0	\$126,000
Employee Waivers	\$23,000	\$41,000	\$64,000	\$0	\$0	\$0	\$64,000
Other waivers of tuition/fees student would normally be charged	\$92,000	\$33,000	\$125,000	\$0	\$0	\$0	\$125,000
<b>Total</b>	<b>\$326,000</b>	<b>\$85,000</b>	<b>\$411,000</b>	<b>\$155,000</b>	<b>\$0</b>	<b>\$155,000</b>	<b>\$566,000</b>

Program	FA File Field	Authorization
Unfunded Scholarships	TUIWAIV, IN-1	Code of Virginia § 23-31
Foreign exchange student waivers	TUITION=H	Code of Virginia § 23-7.4:2 C 2
Virginia's military dependent waivers	TUITION=B	Code of Virginia § 23-7.4 E
Virginia's military member waivers	TUITION=M	Code of Virginia § 23-7.4:2 G
Virginia's military veteran waivers	TUITION=U	Code of Virginia § 23-7.4:2 H
Federal military member and dependent waivers	TUITION=R	Federal Higher Education Opportunity Act (Sec. 114)
Virginia provision for other state's National Guard duty	TUITION=T	Code of Virginia § 23-7.4:2 B
Special arrangement contracts	TUITION=I	Code of Virginia § 23-7.4:2 F
Academic Common Market	TUITION=C	Code of Virginia § 23-7.4:2 C 1
Geographic waivers		
Virginia Community College System	TUITION=D	Code of Virginia § 23-7.4:2 D
University of Virginia's College at Wise	TUITION=E	Code of Virginia § 23-7.4:2 E
Old Dominion University's TELETECHNET sites/higher education centers; Radford's Virginia Educators program	TUITION=P	Appropriation Act (ODU)
Other waivers associated with in-/out-of-state differential		
VCCS dual enrollment agreement	TUITION=F	Code of Virginia § 23-7.4:2 C 3
Nonresident employed full time in Virginia provision	TUITION=G	Code of Virginia § 23-7.4:2 A
One-year grace period for dependent whose parent or spouse abandons Virginia domicile	TUITION=L	Code of Virginia § 23-7.4 B
Graduate student employed at a contract rate of \$4K+	TUITION=Q	Appropriation Act § 4-2.01 b 6
Senior Citizen's Tuition and Fee Waivers	TUIWAIV, IN-1	Code of Virginia § 23-38.54 et seq.
Certain Public Safety Personnel Child/Spouse Waivers	TUIWAIV, IN-1	Code of Virginia § 23-7.4:1 B
Virginia Military Survivors & Dependents Education Program	MSDTFW, IN-7	Code of Virginia § 23-7.4:1 A
Other waivers of tuition/fees student would normally be charged	TUIWAIV, IN-1	Appropriation Act § 4-2.01 b 9



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- A. *Mission – Please provide statement of institutional mission and indicate if there are plans to change the mission over the six-year period. Any changes to institutional mission must be formally submitted to SCHEV for review and approval.*

**UNIVERSITY MISSION AND VISION STATEMENT:**

**The Mission**

Longwood University is an institution of higher learning dedicated to the development of citizen leaders who are prepared to make positive contributions to the common good of society. Building upon its strong foundation in the liberal arts and sciences, the University provides an environment in which exceptional teaching fosters student learning, scholarship, and achievement. As the only four-year public institution in south central Virginia, Longwood University serves as a catalyst for regional prosperity and advancement.

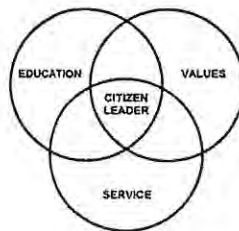
*Approved by the Longwood Board of Visitors, July 1997.*

**The Vision**

Longwood University will transform capable men and women into citizen leaders, fully engaged in the world around them. The University will be a first choice institution renowned for developing the power of citizen leadership in its students for the benefit of the greater community.

*What is a Citizen Leader?*

Citizen leaders are the bedrock of the democracy. They are the reasons communities thrive. They are the people who make the United States of America what it wants to be. They make our nation work. They care and they equip themselves with the tools to bring their caring to life in the world. A citizen leader effectively combines three components of a joy-filled life.



**Education:** The citizen leader is a lifelong learner and stays connected to what is new in the world. Faculty are encouraged and rewarded for contributing to scholarship as well as for their service as teachers.

**Values:** Citizen leaders know their values and live by them. Honesty, equality, civility, duty and an appreciation of the differences among peoples are fundamental values. To these, the citizen leader adds the personal values that define him or her.

*Approved by the Board of Visitors  
June 14, 2013  
REVISED October 4, 2013*

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**Service:** The capstone of every great civilization has always been a commitment to serve others. It is a common precept of the world's great religions; it is one of the finest expressions of our humanity. To the citizen leader, service is not just an extracurricular activity.

*Approved by the Longwood Board of Visitors, December 8, 2007.*

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The Longwood University Board of Visitors currently does not have any plans for revising the University's Mission Statement.

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- B. Strategies –describe in more detail strategies proposed in the spreadsheet. Identify each strategy with the title used in the spreadsheet.

**Improved Retention and Graduation Rates:**

Longwood’s top strategic priority is a systematic, cutting-edge effort to raise the University’s retention and graduation rates to the very top of its peer group, and become a model in this area for the Commonwealth and beyond (\$1,000,000 – one-time initiative). The new president has recruited and restructured his staff in large part around pursuing this goal.

These efforts would build on recently developed efforts to help students graduate in a timely manner, notably the “Soar in Four” and “Fly in Five” (leading to a master’s in five years), which attempt to expedite progress toward credentials. Beyond these efforts, Longwood intends to undertake a campus-wide, data-driven to identify the obstacles that are tripping up Longwood students on their paths toward a degree. Are academic factors chiefly to blame? If so, what can be done to help – better advising, for instance, or more targeted remediation? Could financial aid be more effectively targeted to help those most in danger? At each step, Longwood intends to consult the growing body of research on retention, and what peer institutions have already learned as they tackle this problem, so as not to ‘reinvent the wheel’ or repeat mistakes others have learned. The potential of new technologies to help overcome obstacles to degree completion, and particular obstacles to students in STEM fields, will be considered at each step.

Once the most promising practices are identified, Longwood intends to make carefully targeted investments with the best prospects for return on investment, and sending more Longwood “citizen leaders” in whom the state has already invested into the college-educated workforce. Finally, Longwood will work to share the results and lessons of its efforts with other institutions across the Commonwealth.

Other key elements of this initiative will include:

**Enhance Student Success Program (Continued from 2012-2018 Plan):** Longwood will hire additional support staff to work with identified at-risk students to ensure they have the study skills, organization, tutoring and confidence to successfully complete their program and graduate. Positions will enhance advising, support new freshmen programming and partner with parents and family to support students’ transition and success in their academic and co-curricular activities, and provide data analysis for enrollment management.

**Implement the Quality Enhancement Plan (QEP) (Continued from 2012-2018 Plan):** The QEP, required by The Southern Association of Colleges and Schools (SACS) for reaffirmation, is a five-year plan to use undergraduate research opportunities to improve students’ critical thinking, information literacy and written and oral communication. The QEP will help students develop research skills in lower-level courses, support faculty-student collaboration, and provide opportunities for students to disseminate

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their research on and off campus. All Longwood students must successfully complete an internship or a faculty-directed research project related to their major in order to graduate.

**New Degree Audit System:** The University plans to implement new degree audit software to help guide students through the curriculum toward a degree, helping them monitor their credits and ensure they are on track toward a timely graduation.

**Review and Revise General Education Requirements (Continued from 2012-2018 Plan):** Over the next few years, Longwood will review and revise its General Education requirements to better align them with Longwood's mission and the needs of the Commonwealth, and where possible to facilitate faster degree completion consistent with maintaining high standards.

**Increased degree production science, technology, engineering, and mathematics and other high-need areas such as the health care-related professions (STEM-H):**

Longwood is committed to making a substantial contribution to the STEM-H goals of the Virginia Higher Education Opportunity Act of 2011. First, through new and expanded programs, Longwood will send more STEM-H graduates directly into the workforce. Also, building on its tradition of excellence in teacher education, Longwood will graduate more teachers prepared to bring innovation and excitement to the Commonwealth's K-12 classrooms, which will in turn produce more high school graduates interested in pursuing STEM-H fields in college. Some key initiatives in this area will include:

**5-Year (4+1) Masters in Math/Science Secondary Teaching (Continued from 2012-2018 Plan):** This program, scheduled to begin classes in Fall 2014, builds upon Longwood's strong teacher training in support of the Commonwealth's STEM goals, allows students to attend one additional year and obtain a master's degrees, thus saving them tuition, speeding their path into the teaching workforce, and increasing the Commonwealth's supply of well-trained STEM teachers who will be eligible themselves for higher salaries.

**Explore the Development of New Health Profession Degrees:** Building off Longwood's excellent Nursing program and our exceptional simulation laboratory, Longwood will explore the development of new programs in the health professions and possibly a school designation or college dedicated to the health sciences. Longwood will explore the development of new degree programs in Health Services Management and in Health Information Management, including working with community colleges in a 2+2 type program. The University will explore an undergraduate program in nutrition/dietetics, an area of strong workforce demand, including obesity treatment and prevention.

**Develop an RN-to-BSN Program:** Building on Longwood's BS in Nursing program, the University is working to develop an RN-to-BSN program to begin in 2015-16. Most nurses serving Southside Virginia are RNs, trained in community colleges. But many RNs are recognizing that upgrading their degrees to a BSN is becoming a prerequisite for broader job opportunities and higher salaries. A greater supply of

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BSN nurses also benefits the Commonwealth by creating a more flexible and better-trained nursing workforce. A growing body of evidence indicates BSN-prepared nurses improve healthcare outcomes.

**Hire essential staff for expanding BS in Nursing Program:** Enrollment in the BS in Nursing Program will grow by 10 students during the 2014-2020 biennium. Longwood will need to hire a nursing clinical placement assistant to work with stents on their clinical placements. Increased enrollment will require that a part-time nursing lab instructor position be converted to a full-time position.

**Expand the Cyber-Security Initiative (Continued from 2012-2018 Plan):** Working in close partnership with the Department of Defense (DoD), Longwood is committed to expanding the center of excellence it has established focused on the rapidly expanding and critical field of cyber-security. In 2012, the University reallocated funds to establish a secure cyber-security lab, and in September, 2013, the university was designated a National Center of Digital Forensics Academic Excellence by the Defense Cyber Crime Center. Longwood is the first institution of higher education in Virginia, and only the third in the nation, to receive the designation, which was created to respond to a projected deficit in the public- and private-sector cyber security workforce. The standards for designation were developed around skills identified by DoD as essential to preparing industry professionals. Partnering with industry groups and businesses, the Center for Cyber-Security will continue to focus on cutting-edge research as well as developing interest and guiding career planning in the field in high schools around the Commonwealth, through such endeavors as cyber-security clubs. The initiative is also working to expand internship opportunities with the Defense Intelligence Agency.

**Implement the Center for Excellence in Environmental Education (CE<sup>3</sup>) Initiative (Continued from 2012-2018 Plan):** With implementation scheduled to begin in 2015, the CE<sup>3</sup> initiative will address environmental education across the Commonwealth – at Longwood University, in K-12 classrooms across Virginia, and at Hull Springs Farm, a 662-acre property located in Westmoreland County.

**Expand Undergraduate Research in the Sciences:** Longwood already requires all students to complete either an internship or a research project with a faculty member to graduate. This initiative, geared toward more undergraduate research in the sciences, would provide an additional faculty position and a full-time lab/outreach position.

**Increased enrollment of Virginia students:**

Longwood has traditionally educated Virginians with over 95 percent of its student body coming from the Commonwealth. Despite continued economic uncertainty and a declining number of high school graduates, Longwood hopes by 2020 to increase the size of its student body size not to exceed 6000 students – still predominantly Virginians – through improved retention, stronger recruiting and expanded academic programs, both on-campus and through distance education.

**Additional Faculty Positions (Continued from 2012-2018 Plan):** Longwood faculty currently carry an exceptionally heavy teaching load– four classes per semester on average. This unfunded initiative carries

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over from the 2012-2014 biennium and would provide additional faculty positions in heavily enrolled programs and to replace lecturers, some of whom do not have their terminal degrees, thus causing accreditation issues with SACS. Eight new faculty positions will provide the necessary increase in course offerings to meet the current and future student course demands needed to complete their degrees on schedule.

**Admissions Counselors (Continued from 2012-2018 Plan):** This unfunded initiative carries over from the 2012-2014 biennium. This initiative would provide one admissions counselor to visit community college across the Commonwealth to advise and facilitate the recruitment of transfer students, particularly first-generation college students who may need particular help with the transfer process. A second position would be an in-house undergraduate transfer and graduate recruiter.

**Explore Offering Dual Enrollment Pre-Education Courses:** The University will explore offering student spaces, free but subject to space availability, to the surrounding school divisions as dual enrollment courses in pre-education courses. The courses would be offered for high school level graduation credit, and college credit would be awarded to students who subsequently enrolled at Longwood.

**Develop a cooperative agreement with Southside Virginia Community College (SVCC):** The University will develop a cooperative agreement with SVCC to allow SVCC to hold classes in classroom and labs on the Longwood campus. This will allow more utilization of Longwood facilities year-round and it will provide SVCC with a more central location to reach students in the surrounding counties. It could also encourage students taking classes on the Longwood to consider continuing into a 4-year degree program.

**Possible Additional New Programs to Serve the Commonwealth:** In addition to programs mentioned above, Longwood hopes to serve additional Virginia students by expanding or starting the following programs:

- **Off-Site Programs and Clinical Placements:** Longwood will work to develop degree programs targeting underserved rural areas of Southside Virginia, including Emporia, South Boston and Martinsville and rural areas. The University would also explore expanding clinical placements for the Nursing program and for the Communication Sciences and Disorders program, which could encourage students in these regions to enroll in such programs, and graduates to continue to work in these regions after graduation.
- **Collaborative Early Childhood Inclusive Program:** The Early Childhood Inclusive program is a collaborative program across Elementary Education, Special Education and Communication Sciences and Disorders programs that would provide teacher licensure for PK-3. This is a program that the University has received requests to initiate.
- **MS degree in Social Work (MSW):** With its strong undergraduate course of study, Longwood could provide a valuable service to the region with a master's program. Currently, the Commonwealth's only four MSW programs are in Fairfax, Norfolk, Radford and Richmond, with none serving Southside. Many Longwood graduates currently move to

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other institutions to complete graduate work. The quality of Longwood's undergraduate program could provide a strong base for a seamless undergraduate/graduate program, possibly a five-year program.

- **Graphic Design Animation and Simulation:** Longwood will initiate a program in both current and emerging technology, focused on producing highly marketable graduates in areas such as digital design production, interactive and responsive web technologies and character animation.
- **Therapeutic Recreation:** Longwood hopes to add a new faculty position to this program, where enrollment is currently capped due to accreditation restrictions related to student/faculty ratios.

**Additional Strategies Related to Goals of The Virginia Higher Education Opportunity Act of 2011 (Top Jobs)**

In addition to the priorities above, these Longwood priorities also align with goals articulated in the Top Jobs Act.

**Optimal year-round use of facilities and resources:** Possible expansion of J-Term, running from mid-December to mid-January, which allows students to take up to two courses (six credits) and accelerate degree progress.

**Development of instructional resource-sharing with other institutions in the Commonwealth:** Longwood is home to one of the finest and most significant collections of Virginia vascular plant specimens in the mid-Atlantic region, the Harvill-Stevens Herbarium, which contains more than 75,000 specimens. Longwood will refocus the Herbarium to be a resource for Longwood students and will work collaboratively with public and private research institutions to make this extraordinary collection available for students across the Commonwealth.

**Technology-enhanced instruction, including course redesign, online instruction, and resource sharing among institutions:** Longwood will continue to broaden its online course offerings, which have grown from 228 courses enrolling 2,764 students in 2009 to 363 courses enrolling 3,933 students in 2012. Longwood intends to offer more fully online programs and – recognizing that online teaching must be highly interactive, individualized and responsive to students – build upon its expanding support and training for faculty.

**Increased research, including regional and public-private collaboration:** Longwood will work to expand the reach of its Office of Sponsored Programs and Research to seek support for faculty research programs. It will also explore working in collaboration with the Robert Russa Moton Museum in developing a Center for Civil Rights. The Center would provide opportunities for classes, internships, including collecting oral history, and other research, taking advantage of Longwood's location in a region rich and important with the history of the Civil Rights movement.

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- C. Financial Aid – Plans for providing financial aid to help mitigate the impact of tuition and fee increases on low-income and middle-income students and their families, including the projected mix of grants and loans.

Longwood University continues to keep tuition and fee increases low so that the University is affordable and accessible for students across the Commonwealth.

Seventy-two percent of Longwood students apply for aid (everyone that applies is offered at least student loans) and 52 percent of students receive aid to meet their financial “need” as determined by the FAFSA. In addition to funds received from the Commonwealth, the Longwood University Foundation provides over \$1.2 million in scholarships. The University plans to allocate approximately \$1.8 million in scholarship funding in the 2013-14 fiscal year. Students must meet FAFSA filing deadlines.

This past year, the University changed the way it awards financial aid dollars. The minimum state grant award was lowered from \$3,500 to \$3,000. Because Longwood awards state aid based on a percentage of remaining need, this has increased financial aid awards for our neediest student population while extending grant eligibility to middle-income students, to the extent that funding allows.

Students with an Estimated Family Contribution (EFC) of \$2,000 or lower generally fall into the state’s definition of low-income and those with an EFC between \$2,000 and \$20,000 fall into the middle income group. The revision in awarding financial aid dollars resulted in awarding grant funds to those with \$0 to \$13,000 EFC this year compared to \$0 to \$11,000 EFC last year, thus increasing the financial aid awards to more low-income and middle-income students.

- D. Evaluation of previous Six-Year Plan – Summarize progress made in strategies identified in 2011-12 Six Year Plan. Note how additional General Fund support savings and reallocations were used to further the strategies.

Through reallocations, the University:

- Hired additional faculty to increase enrollments in the following STEM-H programs: Nursing, Communication Sciences and Disorders, Athletic Training, Exercise Science.
- Initiated and will continue the SOLstice Summer Science Institute, which is a four-week summer institute for Longwood University middle school science teacher candidates and practicing middle school science teachers. Participants engage in scientific research through face-to-face and online programs. The program focuses on the Chesapeake Bay environment and utilizes Longwood’s Hull Springs Farm, a 662 acre site in Westmoreland County, which is situated between two tributaries to the Potomac River and just a short distance from the Chesapeake Bay.
- Implemented the Summer STEM Research Program.



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- Developed the CE<sup>3</sup> Program. A feasibility study was conducted and is the basis for the programs that will be implemented in 2015.
- Developed and implemented the BS in Integrated Environmental Science Degree Program. During 2011-12, the University used internal resources to develop the curriculum for the BS in Integrated Environmental Science Degree. The University was granted final approval to offer the program by SCHEV at its May 2013 meeting.

The Commonwealth Center for Advanced Logistics Systems (formerly called the Virginia Logistics Research Center); a collaborative effort between Longwood University, Virginia State University, and the University of Virginia was formerly established using funds provided by the General Assembly. Last year, Virginia Commonwealth University became the fourth university member. The Commonwealth Center for Advanced Logistics Systems, (CCALS) tackles pressing logistics challenges confronting business and government operations. The University used General Fund appropriations for its initial membership fee and operations.

E. Capital Outlay – Note any capital outlay projects that might be proposed over the Six-Year Plan period that could have a significant impact on strategies, funding, or student charges. Do not provide a complete list of capital projects only those projects that would be a top priority and impact E&G and NGF costs.

1. Construct Student Success Center  
O&M for 2015: \$307,000

The General Assembly has appropriated private funding and nongeneral funds (student fees) for the construction of a University Center. The cost of the Center is \$30 million, with \$15 million coming from private funds and \$15 million from bonds paid for through student fees. No exact date has been set for the start of the construction for this project since private funds are still needed; however, it is anticipated that those funds will be raised within the next year. In anticipation of this debt and to prevent a large spike in student fees in one year, the University started trending in the debt service in 2010 and should be completely phased in by 2014-2015.

The 2013 General Assembly appropriated construction funds, but no funding for operations; however, maintenance of this building must still be provided. This project will construct a 25,000 gross square foot building that will provide a central location for vital services focused on increasing student retention and graduation rates, and will thus support the key and overarching strategy – **Enhance Student Success Program**. The new Student Success Center will integrate six academic-related services into a coherent, synergetic, and operationally efficient location that provides easy access for students. The coordinated and co-located services will

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assist and enable students as they move through academic transition points by providing support during the key freshman year, enhancing academic and leadership skills, and providing academic and career advising services.

2. Construct New Academic Building

O&M for 2018: \$435,000

Planning authorization for this new academic facility was appropriated in the 2013 General Assembly. This project is a 42,000 gross square foot building that will provide 75 percent of the projected additional academic and student research space required for approximately 6,000 students in one cost-effective project. It will contain classrooms, collaborative learning space, student research and inquiry space, digital and distance learning facilities, faculty offices, and other academic support space. This facility will provide space for the initial phases of the following academic strategies: **Summer STEM Research Program, Development of New Health Profession Degrees, Develop an Interdisciplinary Minor in Neuroscience, Academic Program Coordinator, Expand Faculty Resources in Therapeutic Recreation, Expend Undergraduate Research in the Sciences, Implement the Qualify Enhancement Plan (QEP), Additional Faculty Positions, Expand the Office of Sponsored Programs and Research, and Develop a Collaborative Research Program with Other Institutions (Stevens Herbarium).**

3. Construct Admissions Office

O&M for 2018: \$244,000

Planning authorization for this new academic facility was appropriated in the 2013 General Assembly. The New Admissions Office project will support the academic strategy of **Increasing the Number of Admissions Counselors**. This project will construct a new 21,000 gross square foot building to house Longwood's Admissions Office. Longwood is committed to meeting the challenges of "Preparing for the Top Jobs of the 21st Century: The Virginia Higher Education Opportunity Act of 2011." A key element of Longwood's commitment is to increase recruitment of new and transfer students, especially those who might not be considering higher education. The new Admissions Office provides sufficient space, handicapped accessibility, convenience, and is a cost-effective facility. This prominent Admissions Office will signify that Longwood is a leader of higher education in Southside Virginia and throughout the Commonwealth.

4. Student Services Building (Lankford Renovation)

O&M for 2017: \$476,000

The Student Services Building will provide space to centralize service functions that are heavily utilized by students. The goal is to bring the following departments together into one facility: Cashiering, Financial Aid, Registrar, Housing, Lancer Card, and Parking Services. Each of these functions plays a critical role in allowing students to stay on track for graduation. Co-locating these services will undoubtedly make it easier for students to seek help and guidance on a

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variety of critical interconnected issues. Providing better and more direct ways of servicing the student body will support the Six Year Plan's goal of **Improving Retention and Graduation Rates**. This facility will be physically joined to the new Student Success Center in order to create synergy with the student support services planned for that facility, as well as leverage building physical efficiencies.

5. Construct New Physical Plant Building  
O&M for 2019: \$741,000

This project will construct a 69,500 gross square foot replacement for the existing university facilities management and operations building. While not specifically tied to an individual or group of academic strategies, this project is an integral and significant part of **Longwood's mission of providing an environment that fosters learning, scholarship, and achievement**. The new facilities necessary to fulfill Longwood's Six-Year Plan requirements must be operated and maintained in superior condition for decades into the future. The existing facilities management and operations building is more than 50 years old, and vastly too small to house the personnel and equipment necessary to maintain Longwood's existing buildings, let alone those in the proposed capital projects. Operating and maintaining the new facilities will require additional personnel, and much more repair and storage space. Therefore, this project is essential for Longwood's Facilities Management Division to capably meet challenges of the anticipated new campus facilities.

6. Renovate South Tabb Hall  
O&M for 2019: \$166,000

This project will renovate the 9,800 gross square foot South Tabb Hall to create a dynamic, efficient environment for the College of Graduate and Professional Studies and the Digital Education Collaborative (DEC). The DEC is a division of the College of Graduate and Professional Studies that is responsible for directing the policy and training framework to enhance online education by ensuring quality, academic rigor, and consistency across all on-line offerings. These efforts directly support the Six Year Plan initiatives related to technology-enhanced instruction, including course redesign and online instruction. South Tabb Hall must be renovated in order to provide the space and physical resources needed to adequately support the following strategic initiatives: **Increase Use of Distance Learning, Develop Fully On-Line Programs, and Enhance the Existing Speech Language Pathology Program**. Each of these initiatives will rely heavily on the staff and resources in the College of Graduate and Professional Studies. In order to service these needs, the College must physically expand to accommodate additional staff, lab and classroom space for instruction, as well as administrative support space. South Tabb Hall is currently unoccupied and available for renovation.

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7. Renovate Greenwood Library

This project will renovate the 71,000 gross square foot Greenwood Library. The Greenwood Library is the academic heart of Longwood. Students, faculty, and staff heavily utilize and rely on the physical and personnel resources found within this facility. It has become the gateway for academic information, collaboration, and networking. For these reasons the Library plays a critical role in the Six Year Plan's goal of **Improving Retention and Graduation Rates**. Improving access to information and providing more conducive study spaces will give students the appropriate environment to reach their potential and earn a degree from Longwood. The current Library was constructed in 1990 and was designed to meet the needs of a now-obsolete information philosophy based on books and paper records. Longwood plans to renovate the existing library in order to leverage technology to create a dynamic environment focused on collaborative learning and electronic resources.

8. Renovate Coyner Hall

The proposed project renovates the 18,000 gross square foot Coyner Hall into an academic facility for the College of Business and Economics (CBE) to support strategies identified in the Six Year Plan. Coyner Hall currently houses Information Technology Services (ITS); however, in the spring of 2014 ITS will relocate into the newly renovated French Hall. This move creates an opportunity to renovate Coyner Hall, which is already physically connected to Hiner Hall, the existing home of the College of Business and Economics. The renovation of Coyner Hall will support the university's Six Year Plan by providing spaces that are essential to successfully implementing several strategic initiatives that reside in the College of Business and Economics. The **Expansion of the Cyber-Security Initiative** will drive a need for an upgraded cyber-security lab which will meet the Department of Defense "secure" lab status. The **Dual Enrollment Course in Personal Finance** will create a need for sophisticated classroom space geared towards financial literacy and investments. The **Geo-Spatial Technology Initiative** will require dedicated space for the geographic information systems (GIS) computers, software, and tools necessary to support the program. Coyner Hall will also provide the necessary space to support the growing number of students, faculty, and administrative support needs of the College of Business and Economics.

9. Construct Multipurpose Center

This project will construct an 86,000 gross square foot multipurpose facility that will support academic programs and university events. It will specifically support the academic strategy to **Conduct an Assessment of Athletic Training and Exercise Science and Recreational Therapy Laboratories** by creating additional multipurpose space for the Department of Health, Athletic Training, Recreation, and Kinesiology (HARK). HARK Department requires additional classroom, laboratory, and exercise space for their rapidly growing academic programs. Their current space

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is woefully inadequate for academic purposes, and time restrictions on the use of this space severely limits the ability of the HARK Department to adequately meet its academic obligations. A significant portion of the facilities constructed by this project will provide flexible space for human factors laboratories, recreation therapy training, clinical practice space and simulators, teacher training space, and adaptable multipurpose facilities for future HARK programs.

10. Construct Sophomore Residence Hall

This project was approved by the Longwood Board of Visitors at its September 13, 2013 meeting. The Board determined that it wanted to house all students on campus for two years and an additional residence hall is needed to accomplish this since two residence halls (Tabb and French) had been taken off-line. The building will not be built until 2015-16 and costs are still being determined.

This project will construct a new campus residence hall containing approximately 200 beds on a conveniently located site in one of Longwood's residential quads. This site is centrally-located on Longwood's main campus, with close and convenient access to academic buildings, the campus dining hall, the library, recreation facilities, and student support offices.

Longwood University has a long history of providing students with housing in University-managed housing. This commitment extends the educational experience beyond the classroom by providing high-quality living space. Even with the advent of Longwood-managed apartment communities, students still demonstrate a strong interest in living in traditional on-campus residence halls because of their convenient central location and ability to foster a sense of camaraderie within the student community.

Expansion of our Compass community provides an opportunity for undeclared students to explore majors, meet and live with new students, participate in programs and outings, make connections with faculty and staff, and be part of a rigorous academic experience. Students selected for this living-learning community will have the unique opportunity to live in a residence hall with other students participating in this program. Students take several general education courses together including Longwood Seminar.

This project will support the following strategies in the *Longwood University 2014-2020 Six Year Plan*

**1. Improved retention and graduation rates**

- a. Enhance student success program – help **increase student retention and graduation rates** by providing more desirable on-campus housing for first- and second-year students. Will provide group integrity for key first two years of students' time at Longwood, allowing continual participation in student success program.

**2. Increased enrollment of Virginia Students**

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- a. Provide desirable on-campus housing as a attractive feature that will support **marketing and recruiting efforts**

This project will help meet an emergent demand for on-campus housing for transfer students. On-campus housing supports transfer students as they transition to the full-time four-year academic environment. Remaining on campus will enhance these students' availability for, and participation in, key elements of Longwood's student success program.

## **Appendix 2**

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**PROPOSED HOUSING & DINING FEES 2014-15**

	<b>2013-2014</b>	<b>2014-2015</b>
<b>Housing</b>		
Main Campus-Double	\$ 5,856	\$ 6,148
Main Campus-Triple	\$ 5,856	\$ 5,898
Main Campus-Single	\$ 6,856	\$ 7,148
Lancer Park-Quads	\$ 6,810	\$ 7,150
Lancer Park-Doubles	\$ 6,940	\$ 8,084
New Lancer Park-Quads	\$ 7,594	\$ 7,974
New Lancer Park-Doubles	\$ 7,040	\$ 8,084
New Lancer Park-Singles	\$ 8,284	\$ 8,698
Longwood Village	\$ 7,054	\$ 7,406
LU Landings-Quads	\$ 7,594	\$ 7,974
LU Landings-Singles	\$ 8,284	\$ 8,698
<b>Dining</b>		
14 + \$250	\$ 3,020	\$ 3,108
Unlimited + \$150	\$ 3,728	N/A
19 + \$150	N/A	\$ 3,800
Block 160 + \$200	\$ 2,798	N/A
Block 160 + \$300	N/A	\$ 3,082
10 + \$350	\$ 2,866	\$ 3,132
Block 80 + \$250	\$ 1,986	N/A
Block 80 + \$300	N/A	\$ 2,138

**PROPOSED COURSE FEE 2014-15**

	<b>2013-2014</b>	<b>2014-2015</b>
Longwood Seminar – PLUS (LSEM 100-60-61-62-63-64)	\$350	\$ 400